



A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

CHAPTER FOURTEEN

Gambling Around the World

2019/20

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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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.
2018-19 (1.0)	August 2021	2018-19 Edition.
2019-20 (1.0)	March 2023	2019-20 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. (Listed here are the latest available figures).

Effects of Covid in 2020

China. The Chinese lotteries of China Welfare and China Sports suspended operations for 49 days from January 22, 2020. The shutdown of lottery operations across mainland China caused January's aggregate lottery sales to fall 43.3% year-on-year. Sales figures for February were expected to come in at zero. March 11, 2020 allowed for the orderly restoration of sales on a rolling province-by-province basis.

New Zealand. Lottery draws in New Zealand continued during the lockdown, brick-and-mortar stores were closed, meaning that lottery tickets were only available online.

Australia. The Australian lotteries, keno, and Tabcorp remained one of that country's few gaming operators that were still able to offer services via its lottery products – available at newsagencies and kiosks.

Europe. Approximately a quarter of WLA member lotteries across the continent reported that their retail networks were closed. Lotteries operating VLTs, slot machines, and casinos were most directly affected. Instant tickets were still available. Online sales were generally fully operational. Overall, initial estimates suggest that turnover (revenue) decreased across the board by between 15% to 30% even in jurisdictions where lotteries remained open and points of sale networks remained intact. Where lotteries were closed and activities are suspended, revenues decreased by 95% or more in general.

Italy. SuperEnalotto (Sisal), Lotto (Lottomattica), and Eurojackpot all stopped completely, even for online players.

France. Francaise des Jeux (FDJ) said that around 80% of its retail points of sale was permitted to remain open amid the lockdown. Nonetheless, FDJ forecasted a loss of about EUR 192 million in revenue overall, including EUR 72 million from its lottery vertical, which accounts for 80% of the group's revenues.

USA. Reports from the U.S. suggest lottery revenues decreased by around 15% year-on-year.

Canada. Lottery tickets continued to be available for purchase, but players were encouraged to play online or via mobile.

South Africa. South African National Lottery continued to offer Lotto, Powerball, and Daily Lotto through digital and online platforms.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 Lotteries Association <https://www.world-lotteries.org/insights/lottery-research/quarterly-lottery-sales-indicator/lottery-sports-betting-and-gaming-sectors-battered-by-coronavirus>

Table 14-1 Some lotteries by total sales (2019 - 2020)³

	2019	2020
New York State Lottery	US\$10.29 billion	US\$9.74 billion
Lottomatica (Italy)	€738.15 million	n/a
China Welfare Lottery	RMB191.24 billion	RMB144.49 billion
China Sports Lottery	RMB230.82 billion	RMB189.436 billion
SELAE (Spain)	€4.59 billion	€1.9 billion
Camelot (UK)	£7.21 billion	£8.37 billion
Le Francaise de Jeux	€13.6 billion	€12.7 billion
Florida Lottery	US\$7.2 billion	US\$7.5 billion

Source: NYSL Financial statements 2018, 2019, 2020; iGB (2019); Lottomatica Annual Reports 2018, 2019; China LotSynergy Annual Reports 2018, 2019, 2020; Spain's online gambling sector grows to €812m in 2018; iGB (2020) Spanish GGR down 50% year-on-year; iGaming Future (2020) Pain in Spain as Handle Drops Off; Camelot Annual Report 2019/20; Camelot Financial Results 2020-21; iGaming Business (2019) Digital growth pushes FDJ sales to €15.8bn in 2018; iGaming Business (2020) FDJ raises 2020 guidance after 9% revenue rise in 2019; iGaming Business (2021) Strong second half helps FDJ limit 2020 turnover and revenue declines; Florida Lottery Annual Financial Report 2019/2020

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.

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.

³ Lottery revenues only.

⁴ Ziolkowski, S. (2020) The World Count of Gaming Machines 2019, Gaming Technologies Association.

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.

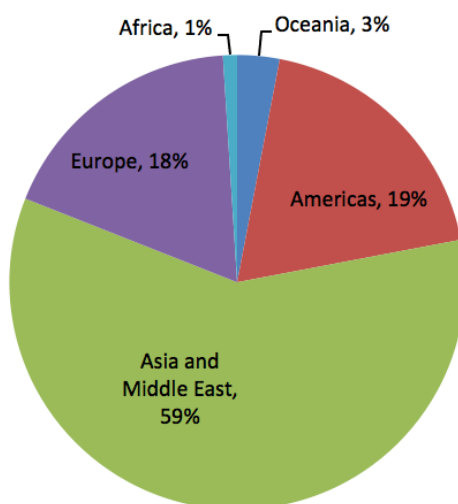
Number of gaming machines worldwide⁵

Table 14-2 Number of gaming machines worldwide by region (2019)⁶

Region	Number of machines
Oceania	212,092
Americas	1,388,958
Asia and Middle East	4,268,478
Europe	1,486,784
Africa	53,512
Total	7,409,824
Cruise Ships	21,301
Total including Cruise ships	7,431,125

Source: Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association (latest figures available)

Figure 14-1 Proportion of gaming machines by region (2019)



Source: Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association (latest figures available)

With over 4.2 million machines, the Asia and Middle East region accounted for 57.6% of gaming machines worldwide, followed by Europe (20.1%) and the Americas (18.7%). Oceania and Africa accounted for only 2.9% and 0.7% of the worldwide total respectively.

⁵ Does not include unregistered or illegal machines.

⁶ Region figures exclude EGMs on cruise ships.

Table 14-3 Top ten countries (all machines) (2019)

Country	Number of machines
Japan	4,195,930
USA	900,704
Italy	407,267
Germany	245,000
Spain	212,153
Australia	192,800
United Kingdom	185,203
Canada	99,070
Argentina	97,555
Colombia	87,365

Source: Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association.

Japan has by far the greatest number of gaming machines (over 4.1 million). This is almost five times as many as the country with the next highest number, the United States, at 900,704 machines. Italy follows next with 407,267, while Australia, in fifth place, has 192,800 machines.

Table 14-4 Top ten jurisdictions (all machines) (2019)

Jurisdiction	Number of casino-style machines
Japan	4,195,930
Italy	407,267
Germany	245,000
Spain	212,153
United Kingdom	185,203
Nevada, USA	163,612
Argentina	97,555
New South Wales, Australia	92,818
Colombia	87,365
Romania	80,545

Source: Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association.

Table 14-5 Top eleven number of machines per capita by country (2019)

Country	Persons per Machine
Sint Maarten	14
Aland Islands	16
Japan	30
Macao Special Administrative Region	36
Monaco	38
Aruba	33
Curacao	65
United States Virgin Islands	82
Gibraltar	114
St Kitts and Nevis	121
Australia	131

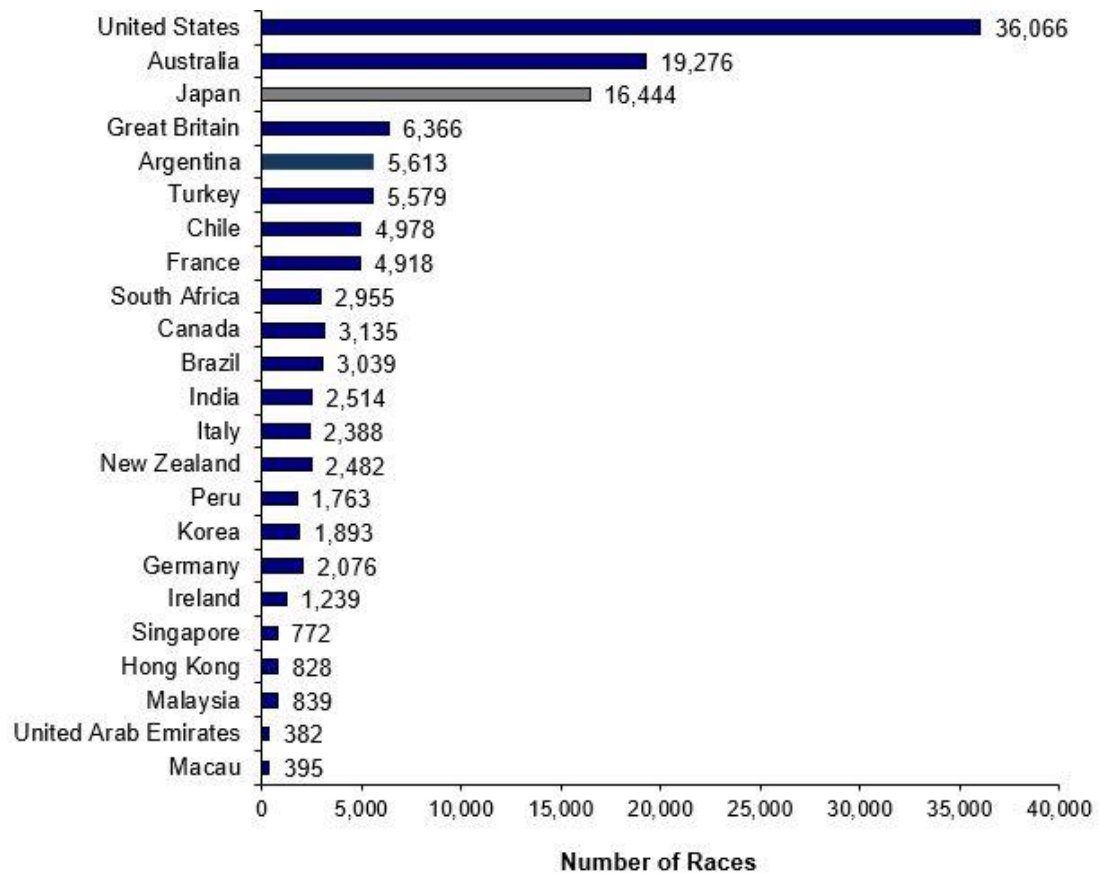
Source: Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association.

Racing

International horse races

Figure 14-2 shows the number of thoroughbred flat horse races held throughout the world in 2019.

Figure 14-2 International comparison of horse races held (2019)



Source: International Federation of Horseracing Authorities (2019) Facts and Figures.

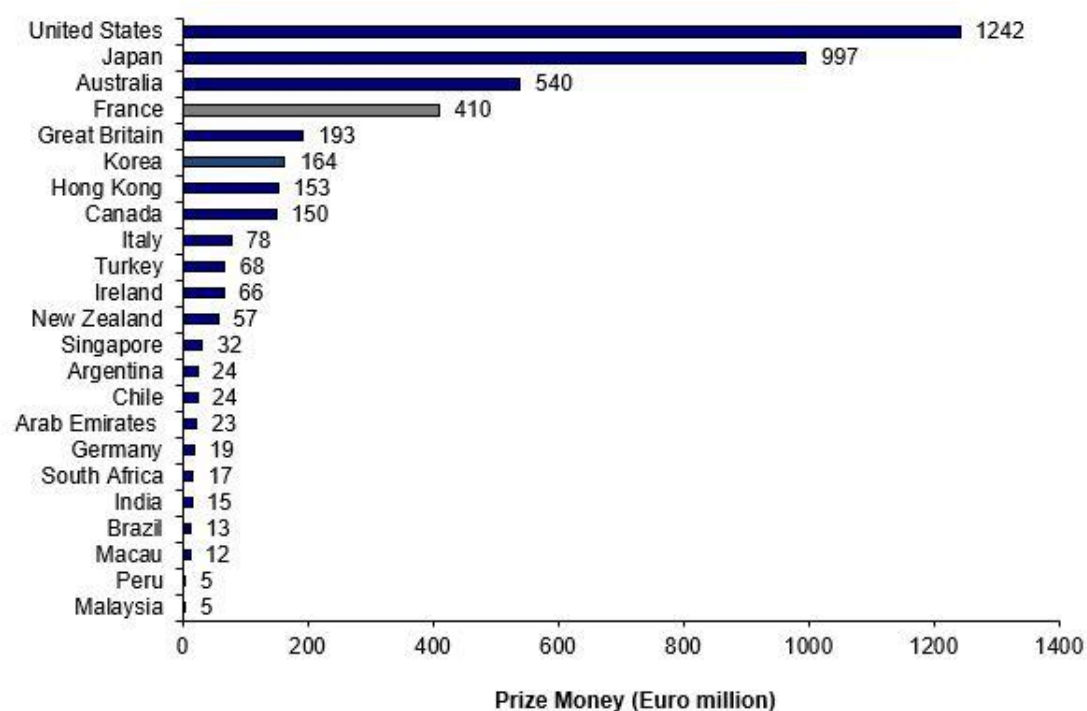
Table 14-6 World-wide race comparisons 2012-19⁷

Country	2012	2013	2014	2015	2016	2017	2018	2019
Argentina	5,558	5,525	5,727	5,708	5,429	5,604	5,320	5,613
Australia	19,534	19,534	19,427	18,949	19,303	19,303	19,320	19,276
Brazil	4,153	3,967	3,673	3,340	2,620	3,131	3,161	3,039
Canada	4,295	3,675	3,363	2,567	3,242	3,137	3,126	3,135
Chile	4,821	4,892	4,954	5,059	5,110	4,978	4,955	4,978
France	4,878	4,887	4,908	4,908	4,983	4,954	4,917	4,918
Germany	1,314	1,253	1,341	1,294	1,204	1,177	1,156	2,076
Great Britain	6,107	6,396	6,308	6,257	6,284	6,284	6,591	6,366
Hong Kong	769	771	777	784	806	807	817	828
India	3,235	2,534	3,188	3,188	2,559	2,756	2,181	2,514
Ireland	1,084	1,104	1,087	1,113	1,152	1,172	1,234	1,239
Italy	3,160	3,094	2,905	2,952	2,757	2,595	2,285	2,388
Japan	16,717	15,992	15,812	16,049	16,218	16,218	16,372	16,444
Korea	1,873	1,904	1,939	1,926	1,917	1,899	1,906	1,893
Macau	498	452	470	411	404	339	328	395
Malaysia	737	696	699	595	668	679	782	839
New Zealand	2,949	2,894	2,777	2,745	2,683	2,460	2,467	2,482
Peru	2,143	1,935	1,868	1,929	1,944	1,913	1,896	1,763
Singapore	993	994	993	928	909	859	802	772
South Africa	3,833	3,809	3,717	3,969	3,843	3,673	3,639	2,955
Turkey	2,357	2,546	2,933	2,898	5,386	5,463	5,613	5,579
United Arab Emirates	320	356	381	397	401	405	443	382
United States	44,929	42,975	41,120	38,941	38,134	38,134	36,446	36,066

Source: International Federation of Horseracing Authorities (2019) 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 14-3 International comparison of horse racing prize money (2019) – (€ million)⁸

Source: International Federation of Horseracing Authorities (2019) Facts and Figures.

Table 14-7 International horse racing betting turnover (2018 & 2019) – (€ million)⁹

Country	2018	2019
Argentina	91	80,107
Australia	16,931	18,254
Brazil	80	58,755
Canada	876	945,598
Chile	254	234,923
France	8,883	8,826
Germany	67	67,170
Great Britain	15,713	17,996
Hong Kong	13,917	13,900
India	152	250,258
Ireland	5,180	4,751
Italy	536	505,782
Japan	26,692	29,405
Korea	5,103	4,953
Macau	97	99,962
Malaysia	90	85,794
New Zealand	361	361,898
Peru	21	18,682
Singapore	700	681,299
South Africa	211	146,895
Turkey	938	1,042
United States	9,841	9,825

Source: International Federation of Horseracing Authorities (2019) 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 2019-20, the gambling industries in Canada comprised various legalised gambling forms in 11 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 Casinos in Canada (2018-2019)

	2017	2018	2019
Alberta	28	28	28
British Columbia	35	35	35
Manitoba	7	7	7
New Brunswick	2	2	2
Newfoundland and Labrador	0	0	0
Nova Scotia	2	2	2
Ontario	25	25	27
Prince Edward Island	2	2	2
Quebec	8	8	8
Saskatchewan	8	8	9
Yukon Territory	-	-	1

Source: AGRI (2022) Canadian Gambling Statistics (1970-2022)

Table 14-9 VLT Venues in Canada (2018-19)

Jurisdiction	2018	2019
Alberta	836	820
British Columbia	-	-
Manitoba	484	470
New Brunswick	220	220
Newfoundland and Labrador	389	389
Nova Scotia	300	271
Ontario	-	-
Prince Edward Island	37	37
Quebec	1743	1743
Saskatchewan	581	575

Source: AGRI (2022) Canadian Gambling Statistics (1970-2022)

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

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 VLTs and Slots in Canada by location (2018-19)

Jurisdiction	2018 VLTs	2018 Slots	2019 VLTs	2019 Slots
Alberta	5,974	14,160	5,973	13,900
British Columbia	-	13,588	-	13,676
Manitoba	6,600	3,612	6,700	3,612
New Brunswick	2,010	808	1,975	839
Newfoundland and Labrador	1,926	-	1,978	-
Nova Scotia	2,072	847	2,043	862
Ontario	-	22,950	-	23,750
Prince Edward Island	280	228	280	228
Quebec	10,365	6,500	9,900	7,502
Saskatchewan	3,974	3,143	4,156	3,380

Source: AGRI (2022) Canadian Gambling Statistics (1970-2022)

Table 14-12 Electronic Gaming Machines (VLTs and Slots) in Canada (2017-19)

Jurisdiction	2017	2018	2019
Alberta	20,267	20,134	19,873
British Columbia	12,725	13,588	13,676
Manitoba	10,070	10,212	10,312
New Brunswick	2,730	2,818	2,814
Newfoundland and Labrador	1,896	1,926	1,978
Nova Scotia	2,899	2,919	2,905
Ontario	22,700	22,950	23,750
Prince Edward Island	494	508	508
Quebec	17,468	16,865	17,402
Saskatchewan	7,164	7,117	7,536

Source: AGRI (2022) Canadian Gambling Statistics (1970-2022)

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.

Table 14-13 Gaming Venues per 100,000 People 18+ in Canada (2018-2019)

Jurisdiction	Casinos	VLTs	Slots	EGMs	Lottery Ticket Outlets
Alberta	0.81	179	416	595	84
British Columbia	0.85	-	330	330	85
Manitoba	0.67	640	345	986	88
New Brunswick	0.32	311	132	443	134
Newfoundland and Labrador	-	453	-	453	207
Nova Scotia	0.25	257	109	366	130
Ontario	0.23	-	205	205	84
Prince Edward Island	1.61	225	184	409	130
Quebec	0.12	145	110	255	123
Saskatchewan	1.01	466	379	844	101

Source: AGRI (2022) Canadian Gambling Statistics (1970-2022)

Expenditure and Revenue**Table 14-14 Commercial Gambling Net Revenue per Adult (18+) 2019- 2022**

Jurisdiction	\$CA			
	2019	2020	2021	2022
Alberta	635	587	343	519
British Columbia	625	599	225	544
Manitoba	632	611	282	465
New Brunswick	454	439.42	334.76	-
Newfoundland and Labrador	567	521	410	536
Nova Scotia	395	374	274	339
Ontario	415	362	182	281
Prince Edward Island	452	437	355	403
Quebec	402	385	201	313
Saskatchewan	759	736	436	652

Source: AGRI (2022) Canadian Gambling Statistics (1970-2022)

Table 14-15 Canadian gambling average expenditure per household comparison (2019)

Expenditure	Average Expenditure	Percentage of Total Expenditure
	\$CA	%
Education	1,691	1.8
Food	10,311	11.0
Games of Chance (net)	186	0.2
Health Care	2,780	3.0
Household Operation	5,448	5.8
Reading materials and other printed matter	165	0.2
Recreation	4,624	4.9
Tobacco and Alcohol	1,785	1.9
Transportation	12,737	13.6
Total Expenditure¹¹	93,724	

Source: Statistics Canada (2021) Table 11-10-0222-01 Household spending, Canada, regions and provinces (Conducted every 2 years. 2021 figures have not yet been published)

¹¹ 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.

Table 14-16 Net gambling revenue in Canada by type and province (2019-20)

	Lottery	Casino	VLTs	Online
\$CA thousands				
Alberta	357,381	1,091,422	545,508	-
British Columbia	519,200	1,832,700	-	179,000
Manitoba	69,251	234,367	350,298	21,365
New Brunswick	80,858	68,418	132,489	-
Newfoundland and Labrador	106,709	-	120,642	-
Nova Scotia	101,079	76,601	123,430	-
Ontario	1,780,000	3,871,000	-	124,000
Prince Edward Island	16,200	18,688	21,019	-
Quebec	929,426	761,253	853,476	96,449
Saskatchewan	98,324	355,009	213,233	-
Northwest Territories & Nunavut	7,709,288	-	-	-
Yukon Territory	3,539,139	-	-	-

Source: AGRI (2022) Canadian Gambling Statistics (1970-2022)

Table 14-17 Commercial Gambling Net Revenue in Canada (2018-2021)

Jurisdiction	2018-19 (CA\$ thousands)	2019-20 (CA\$ thousands)	2020-21 (CA\$ thousands)
Alberta	2,121,407	1,994,311	1,180,210
British Columbia	2,590,126	2,530,882	965,593
Manitoba	661,825	648,633	301,294
New Brunswick	289,774	281,765	216,577
Newfoundland and Labrador	247,785	227,351	178,748
Nova Scotia	313,205	300,948	223,511
Ontario	4,797,461	4,272,000	2,184,000
Prince Edward Island	56,141	55,907	46,655
Quebec	2,744,332	2,659,705	1,404,366
Saskatchewan	677,386	663,382	395,094
Yukon Territories	3,787	3,539	4,317
Northwest Territories & Nunavut	8,653	7,709	9,219

Source: AGRI (2022) Canadian Gambling Statistics (1970-2022)

Participation

Table 14-18 Prevalence by gambling form Canadian Provinces in 2018 (adults 18+)

	NL	PE	NS	NB	QC	ON	MB	SK	AB	BC
Percentage of the population participating (%)										
Lottery/Raffle tickets	64.8	58.2	57.3	62.7	58.7	50.3	52.6	60.3	56.0	47.5
Instant Lottery	42.3	26.5	34.3	39.1	38.1	32.3	33.4	37.0	30.5	33.5
EGMs	8.8	9.3	9.7	11.9	10.8	12.2	22.9	25.1	15.4	13.4
Sports Betting	5.6	10.4	8.3	6.2	5.6	7.6	10.0	11.1	11.7	8.4
Casino Table Games	3.8	4.5	4.7	4.4	7.4	7.2	5.2	8.4	9.8	10.0
Bingo	11.3	7.5	6.5	8.2	4.7	3.5	6.9	6.3	2.6	2.3
Online	7.9	5.0	6.6	6.3	6.6	5.4	4.5	5.9	8.3	8.1
Other Types	2.7	3.0	5.9	5.2	2.0	2.5	2.3	2.4	2.2	3.1
Speculative financial	2.4	2.7	2.3	2.5	2.9	3.6	2.9	3.8	5.8	3.9
Any Past Year Gambling	76.1	69.6	68.1	74.1	70.7	63.9	65.1	73.3	66.9	60.5

Source: Williams, R. et al (2020) *Gambling and Problem Gambling in Canada in 2018: Prevalence and Changes since 2002* (latest available)

In 2020-21, lottery provided the greatest source of net revenue from amongst Canada's gambling formats. This is due to the lottery being least impacted by the COVID-19 closures of gambling venues. Casino and VLT net revenues declined the most in 2020-21 in comparison to past years because of venue closures and disruptions. Net revenue from online formats continued their growth trajectory in 2020-21 and more than doubled from 2019-20.¹²

¹² *Gambling in Canada: Statistics 2020-2021*

United States

Industry Profile

The American Gaming Association lists the following gambling types as legal in the United States¹³:

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

Racetrack Casinos are referred to as Racinos.

Table 14-19 Commercial casinos in the United States (2019 - 2021)

	Number of casinos			Casino category
	2019	2020	2021	
Arkansas	3	3	3	Land-based & Racino
Colorado	33	33	33	Land-based
Delaware	3	3	3	Racino
Florida	8	8	8	Land-based, Racino
Illinois	10	10	11	Riverboat casinos, Land-based
Indiana	13	13	12	Land-based, Riverboat & Racino
Iowa	19	19	19	Land-based, Riverboat & Racino
Kansas	4	4	4	Land-based
Louisiana	20	19	19	Land-based, Riverboat & Racino
Maine	2	2	2	Land-based & Racino
Maryland	6	6	6	Land-based & Racino
Massachusetts	3	3	3	Land-based, Racino
Michigan	3	3	3	Land-based
Mississippi	26	26	26	Land-based & Riverboat casinos
Missouri	13	13	13	Riverboat casinos
Nevada	219	215	215	Land-based
New Jersey	9	9	9	Land-based
New Mexico	5	5	5	Racino
New York	12	12	12	Land-based & Racino
Ohio	11	11	11	Land-based & Racino
Oklahoma	2	2	2	Racino
Pennsylvania	12	13	16	Land-based & Racino
Rhode Island	2	2	2	Land-based
South Dakota	22	23	24	Land-based
West Virginia	5	5	5	Land-based & Racino
Total	465	462	466	

Source: American Gaming Association (2020) *State of the States 2019: The AGA Survey of Casino Entertainment*; American Gaming Association (2021) *State of the States 2020: The AGA Survey of Casino Entertainment*; American Gaming Association (2022) *State of the States 2021: The AGA Survey of Casino Entertainment*

¹³ AGA *State of the States 2019*.

Table 14-20 Casinos in the United States (2021)

	Land Based Casinos	Riverboat Casinos ¹⁴	Racinos	Tribal casinos ¹⁵	Card rooms ¹⁶	Electronic Gaming device Locations ¹⁷
Alabama				3		
Alaska				2		
Arizona				27		
Arkansas	1		2			
California				82	85	
Colorado	33			2		
Connecticut				2		
Delaware			3			
Florida	6		2	7	16	
Idaho				10		
Illinois	1	10				7,841
Indiana	4	6	2	1		
Iowa	14	3	2	4		
Kansas	4			7		
Louisiana	1	14	4	5		1,438
Maine	1		1			
Maryland	5		1			
Massachusetts	2		1			
Michigan	3			23		
Minnesota				40	2	
Mississippi	6	20		3		
Missouri		13				
Montana				15	151	1,301
Nebraska				5		
Nevada	215			4		2,024
New Jersey	9					
New Mexico			5	21		
New York	3		9 ¹⁸	19		
North Carolina				3		
North Dakota				11		
Ohio	4		7			
Oklahoma			2	136		
Oregon				10		2,087
	10		6			60
Rhode Island	2					
South Dakota	24		11			1,267
Texas				2		
Washington				35	43	
West Virginia	1		4			1,199
Wisconsin				24		
Wyoming				3		
Total	349	66	51	515	297	17,217
Number of states	21	6	16	28	5	8

Source: American Gaming Association (2023) *State of the States 2022: The AGA Survey of the Commercial Casino Industry*.

¹⁵ Tribal casinos with either Class II and/or Class III games.

¹⁶ Card rooms in states that do not have commercial casinos with poker facilities.

¹⁷ Non-casino or card room locations with legally authorized electronic gaming devices, including but not limited to video lottery terminals and video gaming terminals.

¹⁸ Includes one land-based casino that offers only VLT machines, as opposed to full casino gaming.

Expenditure and Revenue

Table 14-21 Consumer Spending on Commercial Casino Gaming (2020 - 2021)

State	2020 Gross Revenues (\$US millions)	2021 Gross Revenues (\$US millions)	% Change
Arizona	-	161.06	-
Arkansas	355.52	564.79	+58.9
Colorado	636.08	1,226.33	+92.8
Connecticut	-	78.51	-
Delaware	340.35	483.16	+42.0
DC	13.55	26.80	+97.8
Florida	341.33	649.47	+90.3
Illinois	743.41	1,712.38	+130.3
Indiana	1,709.48	2,724.99	+59.4
Iowa	1,167.70	1,861.33	+59.4
Kansas	299.53	403.50	+34.7
Louisiana	1,658.51	2,380.09	+43.5
Maine	71.37	146.93	+105.9
Maryland	1,225.92	1,925.56	+57.1
Massachusetts	551.94	1,020.78	+84.9
Michigan	638.66	2,700.28	+322.8
Mississippi	1,795.20	2,669.19	+48.7
Missouri	1,263.75	1,896.60	+50.1
Montana	2.36	6,410.00	+171.1
Nevada	7,873.31	13,429.95	+70.6
New Hampshire	23.64	43.83	+85.4
New Jersey	2,881.38	4,737.14	+64.4
New Mexico	51.84	216.20	+317.1
New York	1,184.73	2,712.73	+129.0
Ohio	1,440.28	2,310.31	+60.4
Oklahoma	101.74	145.79	+43.3
Oregon	20.07	30.40	+51.4
Pennsylvania	2,695.92	4,830.81	+79.2
Rhode Island	326.22	594.08	+82.1
South Dakota	105.27	146.06	+38.7
Tennessee	27.13	239.80	+784.1
Virginia	-	285.90	-
West Virginia	435.52	667.98	+30.953.4
Wyoming	-	4.01	-
Total	29,981.68 billion	53,033.15 billion	+76.9

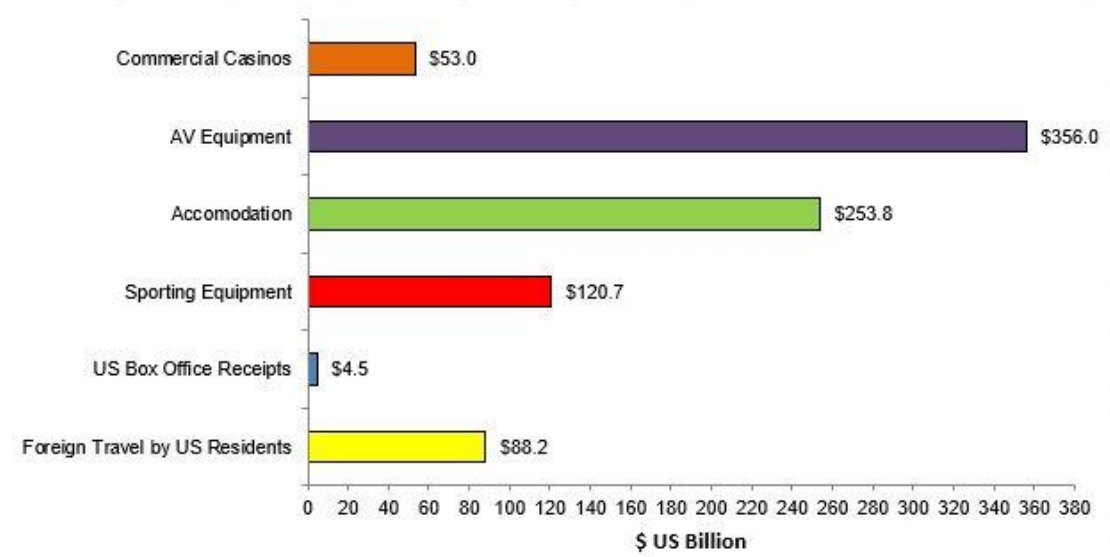
Source: American Gaming Association (2023) State of the States 2022: The AGA Survey of Casino Entertainment; American Gaming Association (2022) State of the States 2021: The AGA Survey of Casino Entertainment

All states experienced losses in consumer spending from 2019 to 2020. Effects of COVID-19 occurred during this period.

Consumer spending rose again in 2021. Spending at commercial casinos in 2021 was highest in Nevada at \$US13.43 billion (up 70.6% on 2020 figures) and lowest in Wyoming with a reported \$US4.01 million.

The largest increase in consumer spending was in Tennessee. It increased by 784.1% over the twelve month period, from \$US27.13 million in 2020 to \$US239.8 million in 2021.

Figure 14-4 Commercial Casino Expenditure (US) versus Other Spending Choices (2021)



Source: American Gaming Association (2023) State of the States 2022; boxofficemojo.com; FRED Economic Data (2021) Table 2.4.5 Personal Consumption by Type of Product.

Table 14-22 Commercial Casino Tax Revenue by State in the United States (2020 & 21)

Jurisdiction	2020 Taxation (US\$ million)	2021 Taxation (US\$ million)	% Change
Arizona		5.96	-
Arkansas	50.55	80.58	+59.4
Colorado	74.69	160.85	+115.4
Connecticut	-	9.78	-
Delaware	156.88	222.21	+41.6
DC	3.01	1.93	+91.2
Florida	119.47	227.32	+90.3
Illinois	162.02	400.77	+147.4
Indiana	391.73	654.82	+67.2
Iowa	248.25	390.84	+57.4
Kansas	80.89	108.96	+34.7
Louisiana	421.26	573.08	+36.0
Maine	30.03	61.25	+104.0
Maryland	507.84	814.35	+60.4
Massachusetts	157.72	288.64	+83.0
Michigan	174.35	607.61	+248.5
Mississippi	213.78	311.48	+45.7
Missouri	309.30	458.77	+48.3
Montana	-	1.15	-
Nevada	609.48	1,023.21	+62.9
New Hampshire	11.01	20.00	+81.7
New Jersey	350.90	562.021	+60.2
New Mexico	23.97	99.99	+317.1
New York	495.20	1,097.29	+121.6
Ohio	487.945	759.33	+55.6
Oklahoma	44.75	66.10	+47.6
Oregon	-	18.76	-
Pennsylvania	1,187.14	2,016.10	+69.8
Rhode Island	163.62	300.15	+83.4
South Dakota	14.14	17.57	+24.2
Tennessee	5,443.92	39.30	+621.9
Virginia	-	20.34	-
West Virginia	189.90	272.26	+43.4
Wyoming	-	0.11	-
Total	6.685 billion	11.693 billion	+75.0

Source: American Gaming Association (2023) *State of the States 2022: The AGA Survey of Casino Entertainment*; American Gaming Association (2021) *State of the States 2020: The AGA Survey of Casino Entertainment*.

Revenue

Table 14-23 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: USA Gambling Facts and Revenue <https://www.onlineunitedstatescasinos.com/usa-gambling-facts/> (Latest data available as of 2023)

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 (2019 - 2021)

Gambling Form	2019	2020	2021
Betting shop	8,322	7,683	6,462
Bingo clubs	652	648	584
Casinos	153	156	7
Adult Gaming Centre	1,462	1,451	1,381

Source: UK Gambling Commission (2023) *Industry Statistics March 2009 to November 2021*.

The UK Gambling Commission estimate that there were 182,164 machines in Great Britain in 2018 - 19; 183,698 in 2019 - 20 and 168,276 in 2020 - 21.¹⁹

Expenditure and Revenue

The Gross Gambling Yield (GGY) of the Great Britain gambling industry (April 2018 – March 2019) was £14.3bn. (a 1% decrease from April 2017 – March 2018).

The Gross Gambling Yield (GGY) of the Great Britain gambling industry (April 2019 – March 2020) was £14.bn. (a 1% decrease from April 2018 – March 2019). April 2020 – March 2021 it was £12.7 billion (an 11% decrease from April 2019 – March 2020).²⁰

Table 14-25 Household expenditure on games of chance in the United Kingdom (2018-2021)

Year	£ million
2018	14,784
2019	14,738
2020	14,751
2021	13,104

Source: Office of National Statistics (2022) *Consumer trends, UK October to December 2021*

¹⁹UK Gambling Commission (2022) *Gambling Industry Statistics* <https://www.gamblingcommission.gov.uk/statistics-and-research/publication/industry-statistics-july-2022-revision>.

²⁰ UK Gambling Commission (2022) *Industry Statistics July 2022*.

Participation²¹

Table 14-26 Participation by gender and age in Great Britain (2019-2021)

Gambling participation by	Percentage		
	2019	2020	2021
Male respondents	51.7	45.5	43.6
Female respondents	41.9	40.0	40.5
16-24 years old	38.1	32.3	30.6
25-34 years old	48.8	40.5	37.9
35-44 years old	47.2	47.6	43.6
45-54 years old	52.5	48.5	51.0
55-64 years old	51.4	45.8	47.4
65+	41.7	39.5	39.0

Source: UK Gambling Commission (2021) Statistics on Participation and Problem Gambling for the Year to September 2021

Table 14-27 Past 4 week participation by gambling type in Great Britain (2020 - 2021)

Gambling Activity	Percentage Participation (%)
Lotteries and related products	
National Lottery tickets	30
Scratchcards	10
Other Lotteries	13
Machines / games	
Football pools	1.7
Bingo	2.9
Slot machines	4.2
Machines in bookmakers	0.8
Casino table games	1.5
Poker in pubs or clubs	0.5
Online games/instant wins	3.1
Betting activities	
Football	5.8
Virtual Dog/Horse races	0.4
Horse races	4.0
Dog races	0.7
Sports betting	6.7
Other sports	2.7
Spread-betting	0.4
Private betting	5.6
Other gambling activity	
Online Gambling	21

Source: UK Gambling Commission (2021) Statistics on Participation and Problem Gambling for the Year to September 2021

In 2019, 47% of respondents participated in at least one gambling activity in the previous four weeks (46% in 2018).

The most popular betting activity in 2019 was sports betting (6.7%), followed by football (5.8%) and private betting (2.3%).

²¹ 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 No. of operational outlets in South Africa (2019-20 to 2020-21)

Outlet	2019/20	2020/21
Operational Casinos	39	38
Operational Slots (casinos)	24,469	18,953
Operational Totalisers	368	328
Operational Bookmakers	550	599
Operational Bingo	56	65
Electronic Bingo Terminals	8,103	8,097

Source: National Gambling Board of South Africa (2021) Annual Report 2020/2021

Table 14-29 Gambling facilities in South Africa (2017-18 to 2019-20)

	2017/18	2018/19 SA Rand	2019/20
Operational Casinos	38	39	39
Operational Slots (Casinos)	25,195	24,781	24,469
Tables (Casinos)	976	932	935
Operational Bookmakers	284	295	255
Operational Bookmaker Outlets	542	602	56
Operational Bingo Outlets	50	52	56

Source: National Gambling Board of South Africa Annual Reports 2017/18, 2018/19 and 2019/20

Expenditure and Revenue

Table 14-30 Financial Overview in South Africa (2017-18 to 2019-20)

	2017/18	2018/19 SA Rand (billions)	2019/20
Turnover	389.799	425.598	451.923
GGR	28.763	30.791	32.652
Tax/Levies	2.899	3.095	3.209

Source: National Gambling Board of South Africa Annual Report 2017/18, 2018/19 and 2019/20.

Table 14-31 Gross Gambling Revenue (GGR) in South Africa (2017-18 to 2019-20)

	2017/18	2018/19	2019/20
South African Rand (billions)			
Casino	18.417	18.632	18.394
Betting	6.137	7.227	8.765
Bingo	1.249	1.581	1.811
LPMs	2.961	3.351	3.682
Total	28.763	30.791	32.652

Source: National Gambling Board of South Africa Annual Report 2017/18, 2018/19 and 2019/20.

Participation

Table 14-32 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 (latest information available)

Gambling participation by South Africans declined substantially from 56.8% of South Africans aged 18+ years in 2002 to 30.6% in 2017.²²

²² 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.

In recent years the Chinese government has supported the development of the esports industry, as evidenced by the recognition of esports as an official medal event at the 2022 Asian Games in Hangzhou.

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 14-33 Revenue and spend by gambling form (2019/20)

	Revenue (HKD billion)	Amount Bet (HKD billion)
Mark Six Lottery	2.4	5.1
Horse Racing	16.6	121.0
Football Betting	12.5	92.6

Source: Hong Kong Jockey Club (2020) Annual Report 2019/20

Table 14-34 Revenue and spend by gambling form (2020/21)

	Revenue (HKD billion)	Amount Bet (HKD billion)
Mark Six Lottery	1.6	3.4
Horse Racing	18.8	136.1
Football Betting	18.5	140.2

Source: Hong Kong Jockey Club (2021) Annual Report 2020/21

Macau

Industry Profile

Gambling in Macau plays an important role in the economy and revenue of the city. Gross Gambling Revenue (GGR) in 2019 was MOP 293.31 billion. In 2020 the GGR was MOP 61.05 billion.²³

Macau charges an effective tax rate of 39% on casino gross gaming revenue (GGR) – with 35 percent via direct government tax, and the remainder via a number of levies to pay for a range of community good causes. In 2019, the Macau government collected a total of MOP104.04 billion in revenue from direct taxes from gaming. Direct taxes from gaming brought in 85.8% of the Macau government's total revenue in 2019.²⁴

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 2022.²⁵

Table 14-35 Number of casinos in Macau (2014-21)

Concessionaries	2014	2015	2016	2017	2018	2019	2020	2021
S.J.M	20	20	20	22	22	22	22	23
Galaxy Casinos	6	6	6	6	6	6	6	6
Venetian Macau	4	4	4	5	5	5	5	5
Wynn Resorts (Macau)	1	1	1	2	2	2	2	2
Melco Crown Jogos (Macau)	3	4	4	4	4	4	4	4
MGM Grand Paradise	1	1	1	1	2	2	2	2
Total	35	36	36	40	41	41	41	42

Source: Gaming Inspection and Coordination Bureau, Macao SAR. <https://www.dicj.gov.mo/web/en/information/DadosEstat/index.html>

Table 14-36 Number of gaming tables and gaming machines in Macau (2016-21)

Item	2016	2017	2018	2019	2020	2021
Gaming Tables	6,287	6,419	6,588	6,739	6,080	6,198
Slot Machines	13,826	15,622	16,059	17,009	8,854	11,758

Source: Gaming Inspection and Coordination Bureau, Macao SAR. <https://www.dicj.gov.mo/web/en/information/DadosEstat/index.html>

²³ <https://www.statista.com/statistics/253755/gross-revenue-from-gaming-and-gambling-in-macao/>

²⁴ Casino.org (2019) *Macau gaming industry responsible for 86 per cent of enclave government revenue.*

²⁵ South China Post (2019) <https://www.scmp.com/business/companies/article/3001800/macau-extends-gambling-licenses-sjm-and-mgm-china-until-2022>

Expenditure and Revenue

Table 14-37 Betting amount from pari-mutuels and lotteries in Macau (2019-21)
MOP Million

Item	2019	2020	2021
Greyhound Racing	-	-	-
Horse Racing	491	252	233
Chinese Lottery	55	56	69
Instant Lottery	0.0013	0.0007	0.0012
Sports Lottery – Football	5,355	3,930	4,255
Sports Lottery – Basketball	2,778	1,801	2,432
Total	8,679	6,039	6,989

Source: Gaming Inspection and Coordination Bureau, Macao SAR. <https://www.dicj.gov.mo/web/en/information/DadosEstat/index.html>**Table 14-38 Gross revenue from various gaming activities in Macau (2019-2021)**
MOP Million

Item	2019	2020	2021
Games of Fortune	292,455	60,441	86,863
Greyhound Racing	-	-	-
Horse Racing	98	50	47
Chinese Lottery	14	13	16
Instant Lottery	0.0009	0.0006	0.0009
Sports Lottery – Football	534	400	415
Sports Lottery – Basketball	211	143	214
Total	293,312	61,047	87,555

Source: Gaming Inspection and Coordination Bureau, Macao SAR. <https://www.dicj.gov.mo/web/en/information/DadosEstat/index.html>**Table 14-39 Gross revenue from various games of fortune in Macau (2019-21)**
MOP Million

Item	2019	2020	2021
VIP Baccarat	135,228	26,280	28,489
Baccarat	120,773	26,936	48,410
Slot Machines	15,138	3,475	4,718
Cussec	9,373	1,333	1,813
Black Jack	2,920	497	727
Stud Poker	1,199	202	316
Roulette	1,337	188	262
Mahjong	137	14	-
3-Card Baccarat Game	654	84	70
Texas Holdem Poker	446	35	-
Live Multigame	2,840	923	1,370
Craps	290	52	72
Other ²⁶	2,120	422	616
Total	292,455	60,441	86,863

Source: Gaming Inspection and Coordination Bureau, Macao SAR. <https://www.dicj.gov.mo/web/en/information/DadosEstat/index.html>

Baccarat in its various forms constitutes the dominant gambling form in Macau. It accounted for approximately 55.7% of the total revenue from Games of Fortune in 2021.

²⁶ 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 2010.²⁷

Marina Bay Sands (MBS) had a total casino revenue of US\$872 million in 2020. This compares to US\$2,167 million in 2019 and US\$2,178 million in 2018.²⁸ Resorts World Sentosa (RWS) had gaming revenue of US\$522,179 million in 2020. This compares to US\$1,206,816 in 2019 and US\$1,251,015 in 2018. (Figures are rounded)²⁹

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.³⁰ 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.³¹

In 2018 and 2019 there were 6,200 slot machines in the Singaporean casinos.³²

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 1,800.³³

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.³⁴

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.³⁵

Expenditure and Revenue

Table 14-40 Monthly median and average Betting Amount (\$) in the last 12 months in Singapore (2011, 2014, 2017 & 2020)

Monthly Betting Amount	2011	2014	2017	2020
Median	\$40	\$20	\$30	\$15
Average	\$212	\$70	n/a	n/a

Source: Singapore National Council on Problem Gambling (2018) Report of survey on participation in gambling activities among Singapore residents 2017; Singapore National Council on Problem Gambling (2020) Report of survey on participation in gambling activities among Singapore residents 2020.

²⁷ Casino News Daily (2015) *Singapore: Gross Gaming Revenue Analysis*, 26/5/15.

²⁸ Sands Annual Report 2019; Sands Annual Report 2020.

²⁹ Genting Annual Report 2019; Genting Annual Report 2020.

³⁰ Straits Times (2019) *New rules on advance payment of entry levies from August..*

³¹ Singapore National Council on Problem Gambling (2016) <http://www.ncpg.org.sg/en/Pages/home.aspx>

³² Ziolkowski, S. (2020) The World Count of Gaming Machines 2019, Gaming Technologies Association.

³³ Gaming Law 2019 Singapore <https://practiceguides.chambers.com/practice-guides/gaming-law-2019/singapore>

³⁴ <http://www.straitstimes.com/singapore/online-betting-to-be-allowed-in-next-two-months-via-singapore-pools-singapore-turf-club>

³⁵ <http://www.toteboard.gov.sg>

Participation

Table 14-41 Gambling participation rates by type of gaming in the last 12 months in Singapore (2011, 2014, 2017 & 2020)

Types of Games	2011 (%)	2014 (%)	2017 (%)	2020 (%)
All Games	47	44	52	44
4D	38	35	42	34
TOTO	28	27	36	31
Social Gambling	13	10	21	16
Singapore Sweep	16	16	18	17
Sports Betting	2	2	2	2
Jackpot Machines in Local Casinos	3	2	1	1
Jackpot Machine in Local Clubs	2	1	1	1
Jackpots Machine in Cruises/Outside Singapore	3	2	2	2
Table Games in Local Casinos	4	1	1	1
Table Games in Cruises/Outside Singapore	4	2	1	1
Horse Betting	1	1	1	1
Online Gambling	1	1	1	0.3

Source: Singapore National Council on Problem Gambling (2020), Report of Survey on Participation in Gambling Activities Among Singapore Residents, 2020.

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.³⁶

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.³⁷

In 2019, there were 4,309 slot machines in South Korea.³⁸

Expenditure and Revenue

Table 14-42 Turnover by sector in South Korea (2020-21)

Gambling Sector	2020 (100 million won)	2021 (100 million won)
Casino	10,413	11,800
Horse racing	10,890	10,476
Bicycle racing	3,509	3,792
Motorboat racing	680	1,513
Lottery	54,152	59,753
Sports Lotto	48,928	56,195
Bullfight	26	229

Source: The National Gambling Control Commission – Korea (2021), <https://www.ngcc.go.kr/eng/stats/scale.do>

³⁶ The National Gambling Control Commission – Korea (2016)

³⁷ Haps Magazine Korea (2019), *Foreigner-only Casinos in South Korea See Increased Turnover in 2018*.

³⁸ Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association.

Japan

Industry Profile

Japanese officials have approved plans to build the country's first gambling resort. The complex will open in the western city of Osaka in 2029. Casinos have long been illegal in Japan. But a law was passed in 2018 providing exceptions to games, such as poker or baccarat, to create jobs and boost tourism.

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 were an estimated 4,195,930 pachinko/pachislo machines in Japan in 2019.³⁹ The number of pachinko halls has fallen to 8,778 (2020) from 9,386 (2019) and 9,794 (2018). There were over 17,000 two decades ago, according to statistics collected by the National Police Agency which regulates the industry⁴⁰

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 2018.⁴¹

Expenditure and Revenue

According to a white paper published by Daikoku Denki, a major manufacturer of equipment for pachinko parlours, the market size of the pachinko industry in 2020 was JPY14.6 trillion (US\$133 billion), down by JPY5.4 trillion (US\$49.2 billion) from the previous year, with total gross profit down JPY890 billion (US\$8.1 billion) to JPY 2.35 trillion (US\$21.4 billion). Sales and gross profits fell 27% year-on-year.⁴²

The Japanese Family Income and Expenditure Survey⁴³, 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.⁴⁴

In 2019 the average household expenditure on admission fees and games charges was 35,365 Yen (approximately \$433 Australian dollars). This compares to a household average expenditure of 2,996,0452 Yen (approximately \$36,707 Australian dollars) on all consumption expenditures.⁴⁵

³⁹ Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association.

⁴⁰ Statista.com (2020) *Number of nationwide pachinko parlours in Japan from 2012 to 2020*.

⁴¹ Japan Times (2019) *Japan is going all-in on casinos. Will the gamble pay off?*

⁴² Inside Asian Gaming (2021) *Japan's pachinko industry shrinks 27% year-on-year to US\$21 billion*.

⁴³ Japanese Ministry of Internal Affairs and Communications (2019) *Family Income and Expenditure Survey 2019*.

⁴⁴ 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.

⁴⁵ Currency conversion carried out from www.x-rates.com on September 6, 2021 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 2019.⁴⁶

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).

There are 33 cities in the Philippines offering gambling. There are 76 casinos in and 25, 503 slot machines.⁴⁷ Starting in 2018, PAGCOR operated casinos were privatized. There were 21,433 slots machines in operation in the Philippines in 2019.⁴⁸

There were a total of 29 gaming sites from bingo games, electronic games and sports betting that commenced operations in 2020. However, a total of 36 gaming sites ceased operations and had revoked licenses on the same year. One entity, ISOC Land-Clark, Inc., was granted a provisional license to operate a casino in August 2020.

PAGCOR's Gross Gambling Revenue (GGR) was approximately P250.75 billion revenues in 2019 and P98.79 billion in 2020.^{49 50}

⁴⁶ Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association.

⁴⁷ World Casino Directory (2021) www.worldcasinodirectory.com

⁴⁸ Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*, Gaming Technologies Association.

⁴⁹ PAGCOR Annual Report 2019.

⁵⁰ PAGCOR Annual Report 2020.

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.⁵¹

There are currently 7 licensed casinos and 23 electronic gaming clubs in Vietnam. The licensed casinos are able to offer true casino table games such as baccarat, blackjack, roulette, craps, pai gow, and sic-bo (tai sai) along with slots and other electronic games. The clubs are restricted to electronic or mechanical games that do not require a live dealer, croupier, or box man.⁵²

In 2017 the Vietnamese government announced that it was prepared remove the longstanding ban on locals gambling in casinos by approving a three-year trial that would allow residents to gamble at selected casinos. The trial included 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 was also suggested. Further, operators would be required to invest a minimum of \$2 billion in order to obtain the gambling license required.⁵³

The Bai Dai Integrated Resort Project on Phu Quoc island was confirmed as the first casino to be granted authority to participate in the pilot program. A project currently in development in Quang Ninh province was to be the second location.⁵⁴

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.⁵⁵

There were 1,966 gaming machines in operation in Vietnam in 2018 and 2,656 in 2019.⁵⁶

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. (latest figures available)⁵⁷

A number of Vietnamese lottery companies suffered hits to profits in 2021. Some recorded double digit drops due to the continued effects of the COVID-19 pandemic e.g. An Giang Lottery, whose revenues of more than VND3.3tn (\$142.7m) and after tax profits of VND344bn (\$14.5m) in 2021 dropped 25% and nearly 44%, respectively, from 2020. The total revenues of Hau Giang Lottery fell 19% year-on-year, in addition to a nearly 27% fall in its after tax profits. Other lottery companies in Dong Nai, Dong Thap, Ho Chi Minh City and Ben Tre provinces are yet to release their final 2021 financial statements, but the majority of these groups have also recorded a decrease in revenue and profit.⁵⁸

⁵¹ Asia Times (2018) *Short on cash, Vietnam punts on gambling*, 8 October 2018.

⁵² World Casino Directory (2019) <https://www.worldcasinodirectory.com/vietnam>

⁵³ World Casino News (2017) *Vietnamese legislation could spell "death knell" for Cambodian border casinos*.

⁵⁴ CalvinAyre (2018) *Vietnam identifies first casino to take part in locals gambling trial*, 18 June 2018.

⁵⁵ Ggrasia (2017) *Vietnam's casino market worth up to US\$1.2bln*, 9 August 2017.

⁵⁶ Ziolkowski, S. (2019) *The World Count of Gaming Machines 2018*; Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*.

⁵⁷ Vietnamese lottery firms make bigger revenues in 2017, http://www.xinhuanet.com/english/2018-01/23/c_136917734.htm

⁵⁸ <https://lotterydaily.com/2022/04/25/news/vietnamese-lotteries-suffer-significant-double-digit-drops-to-profit-in-2021/>

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 150.⁵⁹ Cambodian nationals are barred from gambling in casinos.

There were 7,660 gaming machines in operation in Cambodia in 2018 and 4,495 in 2019.⁶⁰

Tax revenue from casinos was approximately US\$85 million in 2019 and US\$40 million in 2020 (according to the Deputy Director of the Ministry of Economy and Finance).⁶¹

⁵⁹ Phnom Penh Post (2019) *Number of casinos jumps by 53% in 2018*, 2 January 2019.

⁶⁰ Ziolkowski, S. (2019) *The World Count of Gaming Machines 2018*. Ziolkowski, S. (2020) *The World Count of Gaming Machines 2019*.

⁶¹ IAG (2021) *Cambodia sees casino tax halved in 2020*, <https://www.asgam.com/index.php/2021/03/22/cambodia-sees-casino-tax-revenue-halved-in-2020/>