

Statistics Update: Provincially- Regulated Online Gambling in Canada

By Rhys Stevens
April, 2023



Disclosure of Potential Conflict of Interest

Presenter Disclosure

- Grants/Research Support
 - Alberta Gambling Research Institute (position funding; ANP research team member)

Questions to be answered:

- Who operates provincially-regulated online gambling in Canada?
- What are the gambling products on offer and who participates?
- How much revenue does it generate?

Online Gambling

Remote gaming activities by means of the Internet, and mobile Internet.



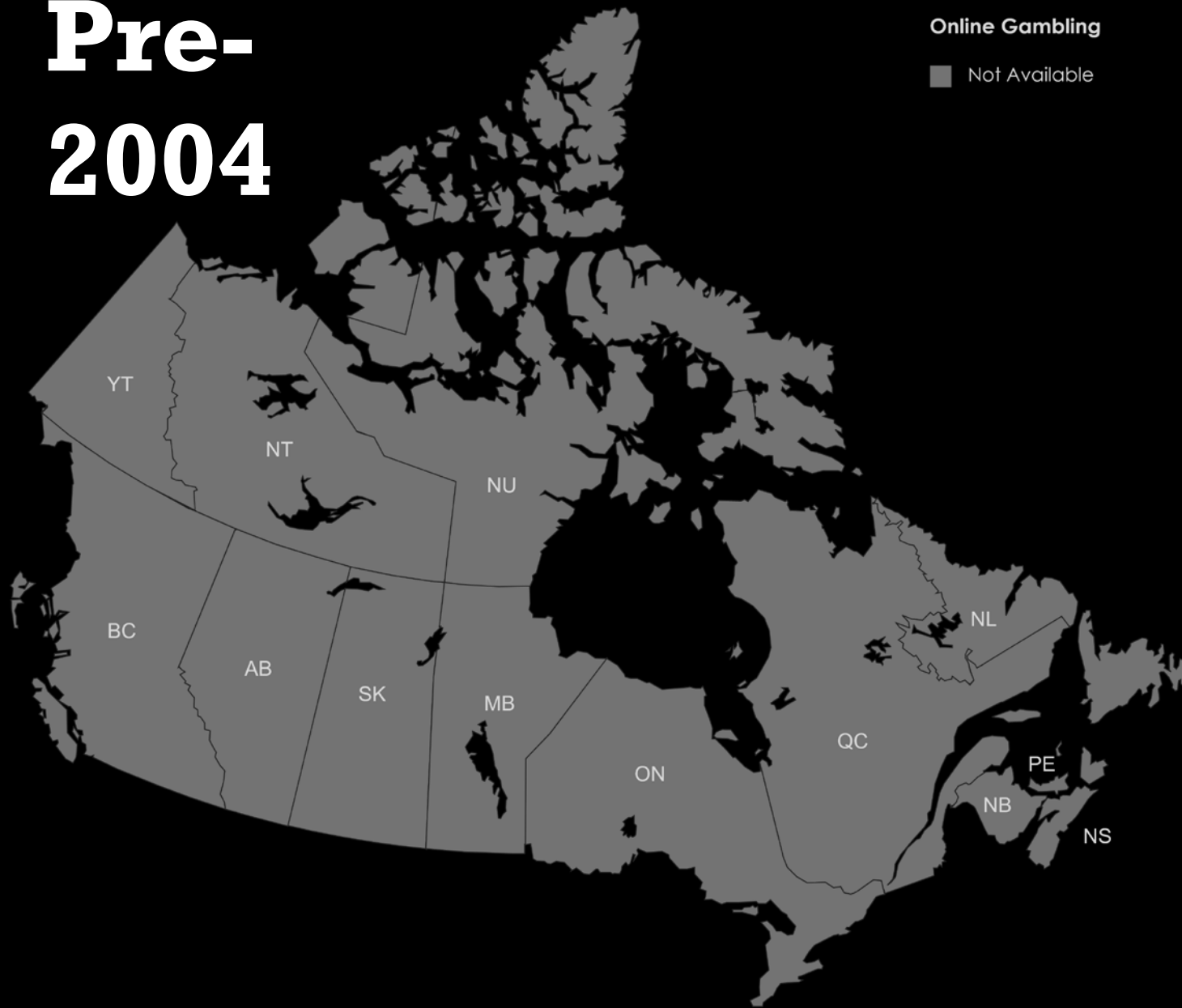
Who operates
provincially-
regulated
online
gambling in
Canada?

History

Pre- 2004

Online Gambling

■ Not Available



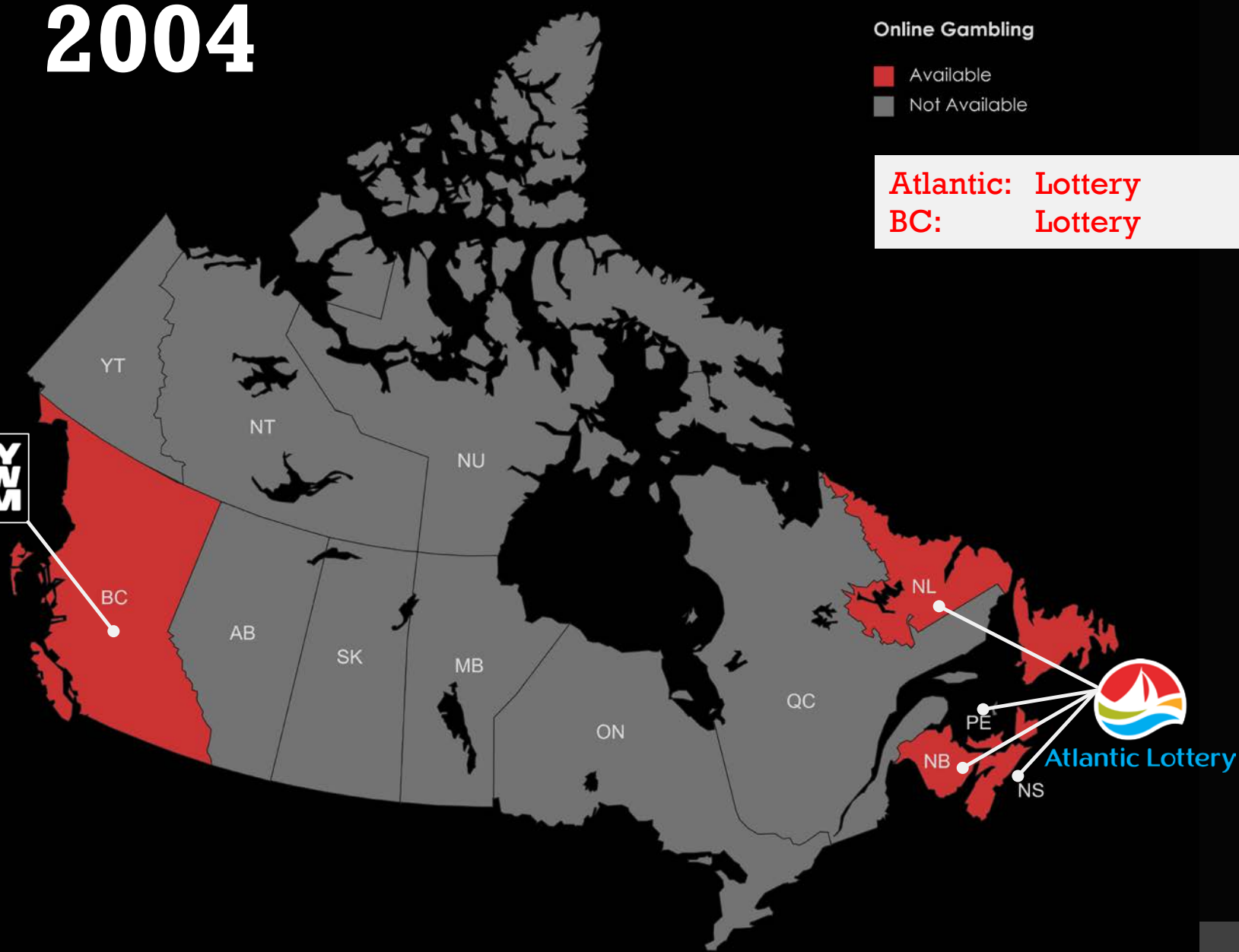
History

2004

Online Gambling

- Available
- Not Available

Atlantic: Lottery
BC: Lottery



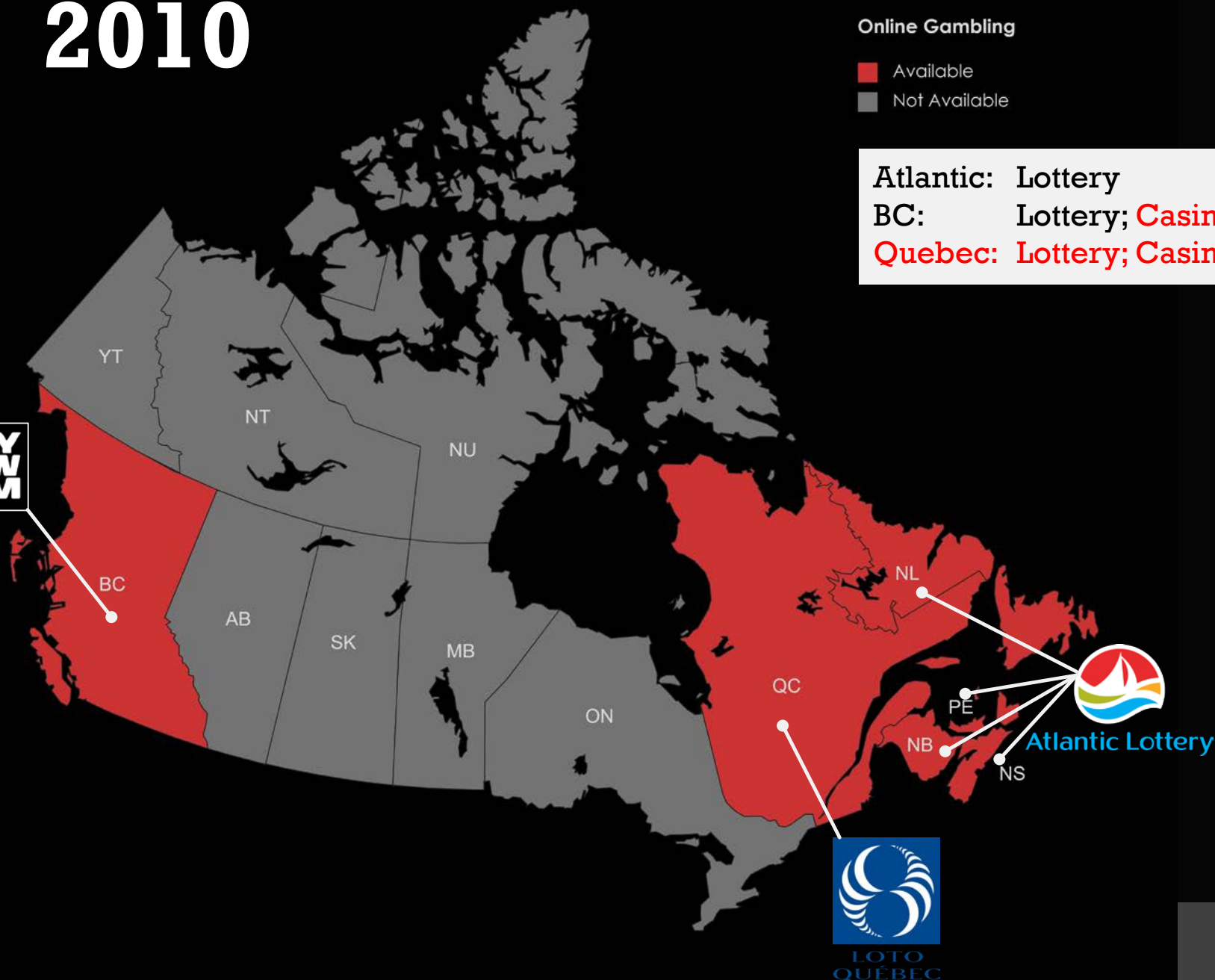
History

2010

Online Gambling

- Available
- Not Available

Atlantic: Lottery
BC: Lottery; **Casino; Poker**
Quebec: Lottery; Casino; Poker



Atlantic Lottery

History

2013

Online Gambling

- Available
- Not Available

Atlantic: Lottery
BC: Lottery; Casino; Poker
Quebec: Lottery; Casino; Poker
Manitoba: Lottery; Casino; Poker



BC

AB

SK

MB

ON

QC

NB

PE

NS

NL

YT

NT

NU



Atlantic Lottery



LOTO
QUÉBEC

History

2015

Online Gambling

- Available
- Not Available

Atlantic: Lottery
BC: Lottery; Casino; Poker
Quebec: Lottery; Casino; Poker
Manitoba Lottery; Casino; Poker
Ontario: Lottery; Casino



BC

NT

NU

AB

SK

MB

ON

QC

NL

PE

NB

NS



Atlantic Lottery



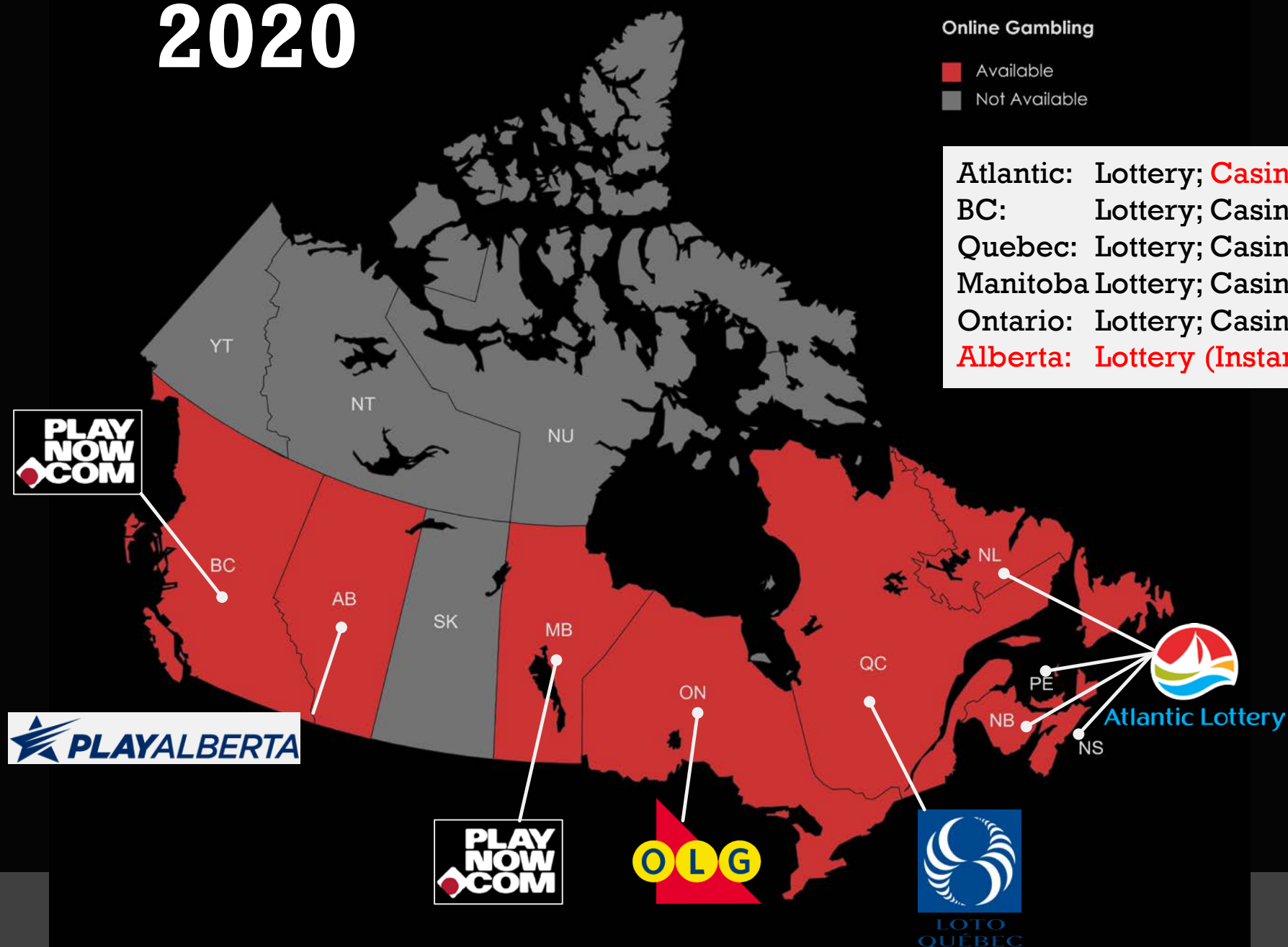
History

2020

Online Gambling

- Available
- Not Available

Atlantic: Lottery; **Casino (NB)**
BC: Lottery; Casino; Poker
Quebec: Lottery; Casino; Poker
Manitoba Lottery; Casino; Poker
Ontario: Lottery; Casino
Alberta: Lottery (Instant); Casino



History

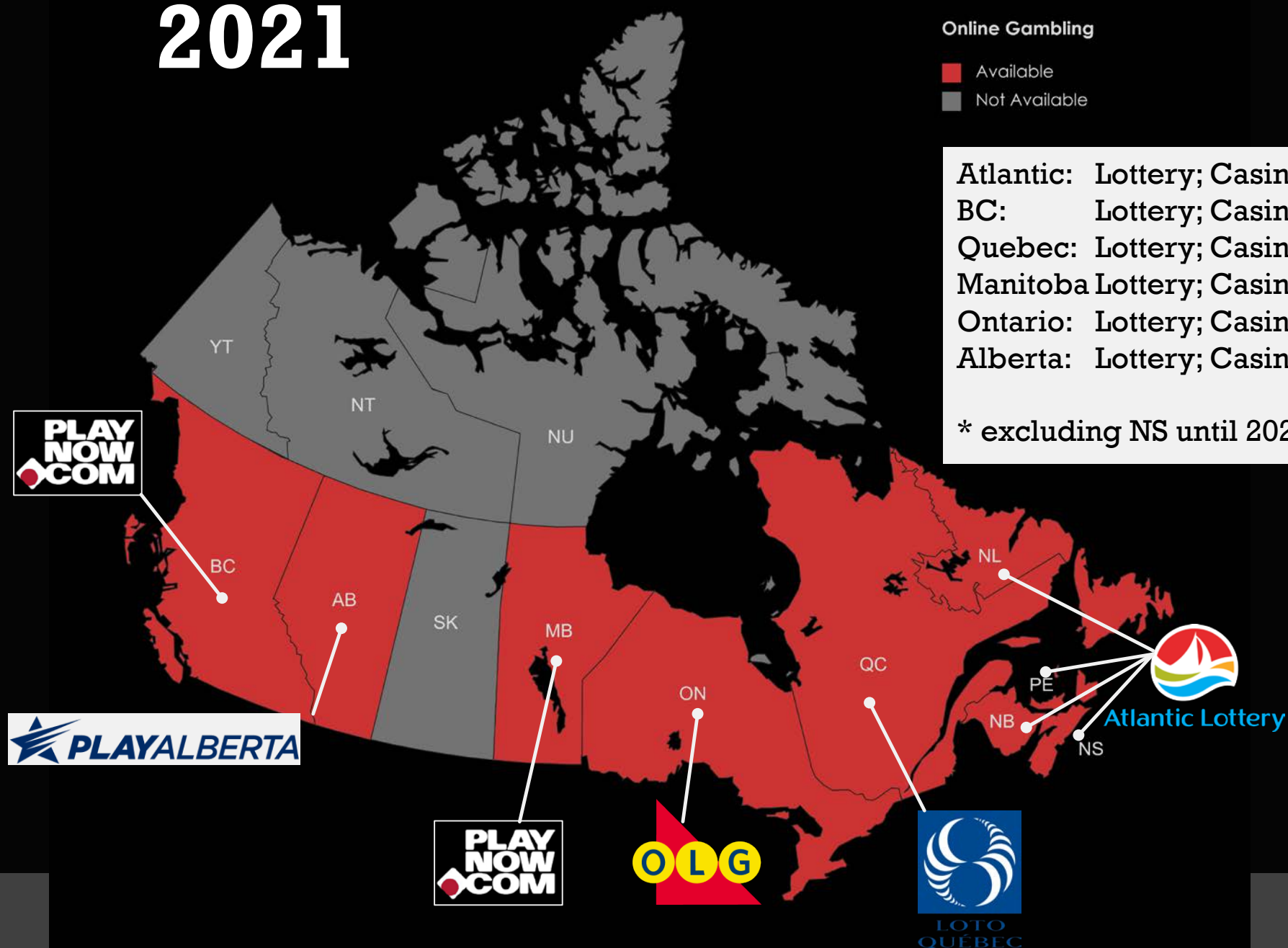
2021

Online Gambling

- Available
- Not Available

Atlantic: Lottery; Casino (NB); **Sports***
BC: Lottery; Casino; Poker; **Sports**
Quebec: Lottery; Casino; Poker; **Sports**
Manitoba Lottery; Casino; Poker; **Sports**
Ontario: Lottery; Casino, **Sports**
Alberta: Lottery; Casino; **Sports**

* excluding NS until 2022



History

2022

Online Gambling

Available

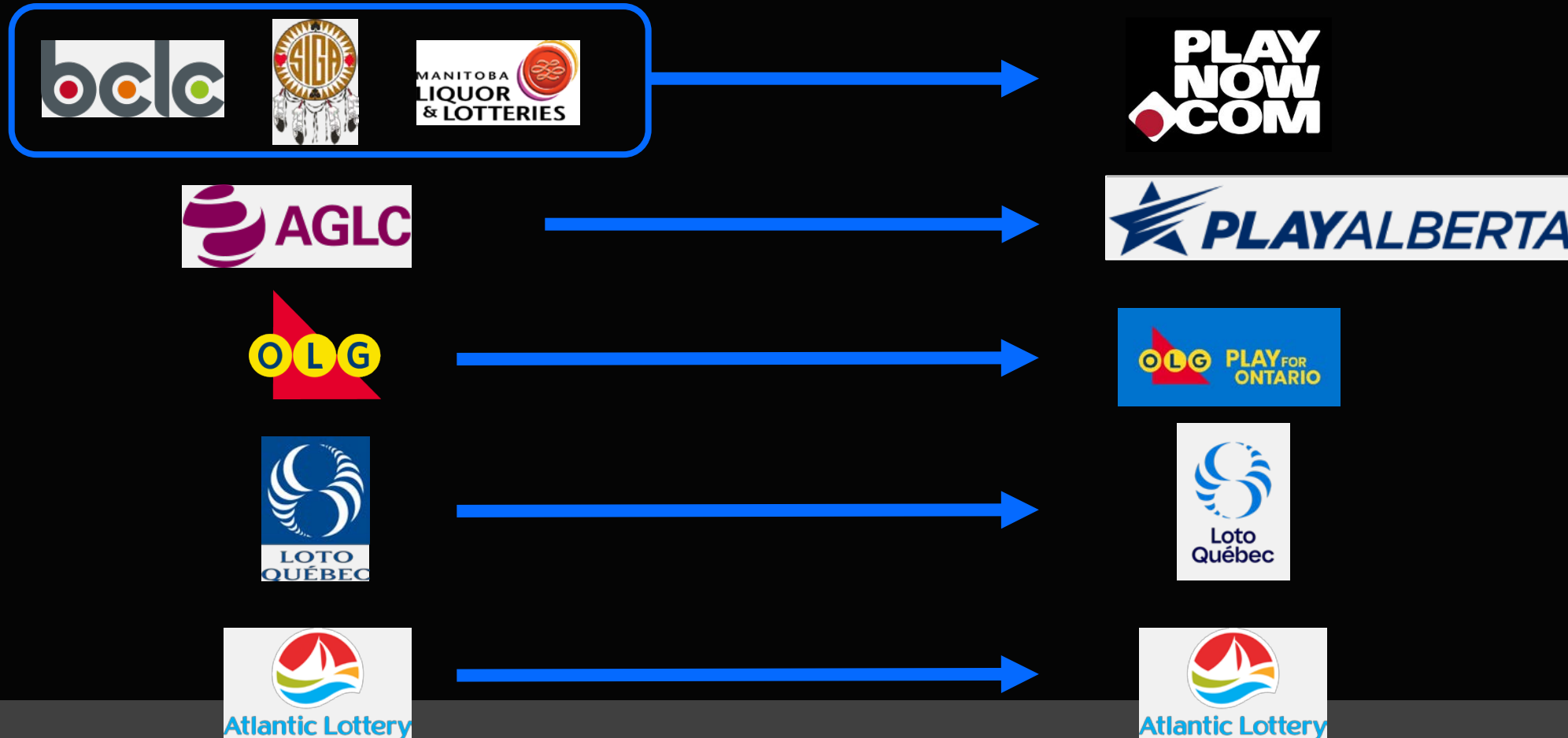
- Atlantic: Lottery; Casino (NB **NS**); Sports
- BC: Lottery; Casino; Poker; Sports
- Quebec: Lottery; Casino; Poker; Sports
- Manitoba Lottery; Casino; Poker; Sports
- Ontario: Lottery; Casino, Sports; **Private**
- Alberta: Lottery; Casino; Sports
- Sask.:** Lottery; Casino; Sports



Provincially-Regulated Online Gambling [All Provinces]

Provincial Regulators / Operators

Regulated Online Sites



Provincially-Regulated Private Operators [Ontario Only]

Regulated Licensors

<https://igamingontario.ca/en>



36 Operators & 68
Gaming Websites
(December 31, 2022)

Regulated Private Operators & Sites

<https://igamingontario.ca/en/player/regulated-igaming-market>

What Sites Are Regulated?

Use this directory of all igaming sites offered by regulated Operators contracted by iGaming Ontario*.

*[OLG.ca](#) is operated legally under the conduct and management of the Ontario Lottery and Gaming Corporation. For more information, see [How iGaming Ontario is Different from the Ontario Lottery and Gaming Corporation \(OLG\)](#).

Search for gaming sites

Legal Entity Name

- Any -

Offerings

- Any -

Items per page

100

Apply

Gaming Site	URL	Offerings	Legal Entity Name
888 Casino	888casino.ca	Casino	VHL Ontario Limited
888 Poker	888poker.ca	Poker	VHL Ontario Limited
888 Sport	888sport.ca	Sports Betting	VHL Ontario Limited
Bally Bet	https://on.ballybet.ca	Casino, Sports Betting	Bally's Canada Inc.
Bet365	on.Bet365.ca	Casino, Sports Betting	Hillside (International Sports) ENC
Bet99	Bet99.ca	Casino, Sports Betting	1000007698 Ontario Ltd (Bet 99)
Betano	www.betano.ca	Casino, Sports Betting	Kaizen Gaming Canada Inc.
BetMGM Casino	Casino.on.BetMGM.ca	Casino	BetMGM Canada Inc.

What are the products & who participates?

Products & Participants

GAMESENSE

PLAYALBERTA

Login Sign up

PLAY IN ALBERTA.
STAYS IN ALBERTA.

GameSense

Casino

View All >

1 2 3 4 5 6

1 2 3 4 5 6

Sports

View All >

1 2 3 4 5 6

Live Dealer

View All >

1 2 3 4 5 6

Lottery

View All >

1 2 3

Max
Tuesday, March 21, 2023
\$40 Million Est.
Buy Tickets

649
Wednesday, March 22, 2023
\$5 Million Est.
Gold Ball Draw (10 balls remaining)
1 x \$1,000,000 or \$50,000,000
Buy Tickets

6/49
Thursday, March 23, 2023
\$1,000 a day for life
Buy Tickets

Products [% Net Sales, 20221-22, PlayAlberta.ca]

➤ Casino Games



74.2%

➤ Casino Live Dealer



6.5%

➤ Sports Betting

WEDNESDAY NBA BET-BACK BONUS

Place a pre-game parlay bet containing 5 selections or more on Wednesday NBA 'Money Lines' (Minimum 1.15 odds) and if only one selection is a loser, get your bet back!

[MORE INFO](#)



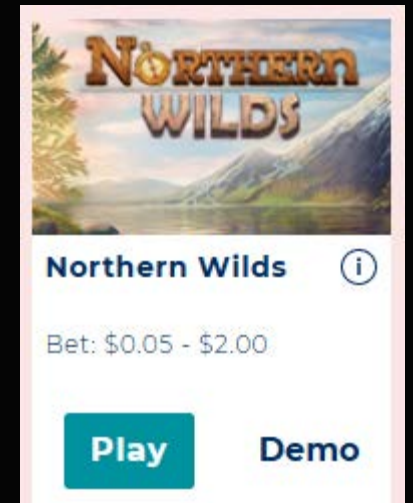
1.9%

➤ Lottery



6.5%

➤ Lottery - Instant



10.9%

Products: PlayAlberta.ca – Online Gambling Net Sales

Online gambling net sales

As at March 31

AGLC's online gambling platform, PlayAlberta.ca, offers five distinct gaming experiences for players. A total of \$3.6 billion in bets were placed on PlayAlberta.ca across all games in 2022. Net sales and launch dates can be summarized as:

AGLC launched two additional gaming experiences in 2022. Online lottery on PlayAlberta.ca was launched on May 20, 2021 and single-event sports betting launched on August 30, 2021, four days after the legalization of single event sports wagering in Canada.

	Launch date	2022		2021	
		in thousands of dollars	% of net sales	in thousands of dollars	% of net sales
Casino	Sept 30, 2020	\$107,481	74.2%	\$31,825	86.0%
Instant	Sept 30, 2020	15,731	10.9%	4,739	12.8%
Live Dealer	Mar 11, 2021	9,568	6.5%	463	1.2%
Lottery	May 20, 2021	9,398 ²	6.5%	-	-
Sports	Aug 30, 2021	2,700	1.9%	-	-
TOTAL		\$144,878		\$37,027	

Play Alberta saw the number of total signups grow 156.0 per cent year over year. The growth can be attributed to the launch of two additional gaming experiences, online lottery and single event sports wagering in 2022.

Products: PlayNow Saskatchewan

Fraction of wagers from sports betting

Of the \$31.8 million wagered on the site in November and December, Bellegarde said \$30.6 million was from eCasino gambling — while sports betting was responsible for \$1.2 million.

"One of the things that surprised me a little bit is that sports is not as big of a driver for net win as the slot machines," he said.

Net win is the total amount wagered minus the prizes that are paid out.

"When you see all the money that's being invested by other companies into sports advertising, you would think that there's a lot of money there," he said.

"The reality is that sports makes up less than five per cent of our net win."

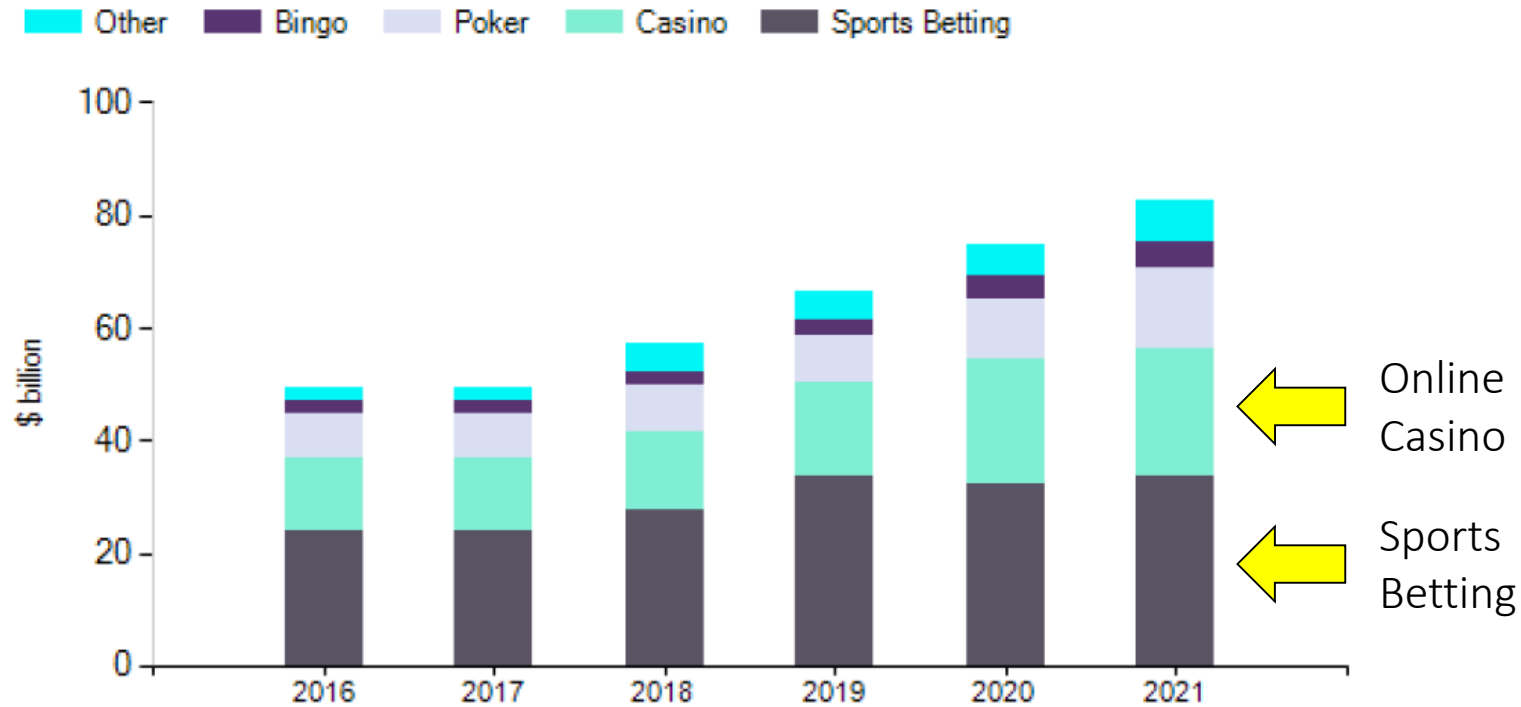
Products: Global Online Gambling Industry

Global Online Gambling Industry Category Segmentation: % Share, by Value

Category	2019	2020	2021
Sports Betting	50.8%	42.9%	40.7%
Casino	24.6%	29.5%	27.6%
Poker	12.4%	14.7%	17.2%
Bingo	4.5%	5.2%	5.4%
Other <small>(includes lotteries)</small>	7.7%	7.7%	9.1%
Total	100%	100%	100%

Products: Global Online Gambling Industry

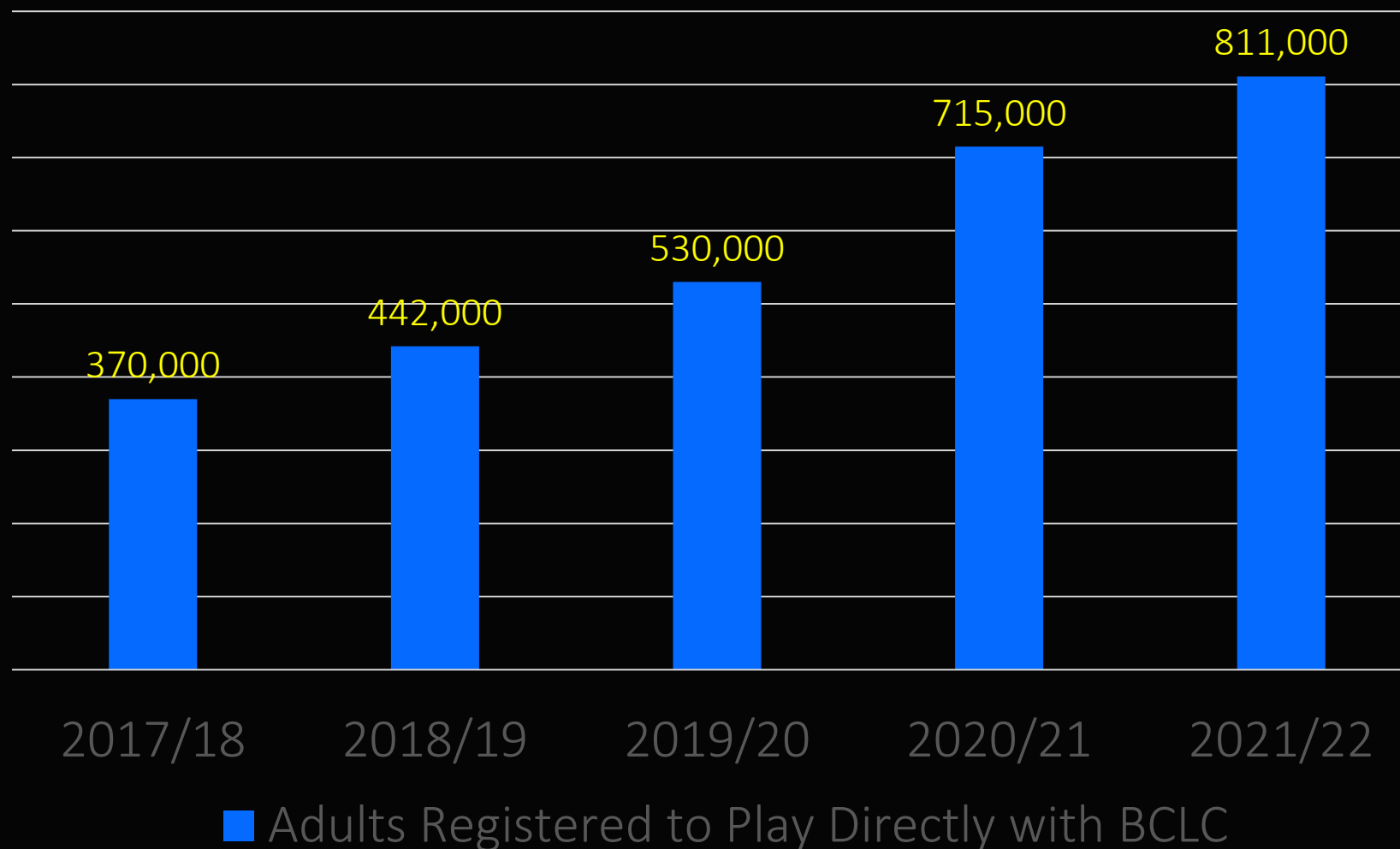
Figure 2: Global online gambling industry category segmentation: \$ billion, 2016-2021



SOURCE: MARKETLINE

MARKETLINE

Participants [Adults Registered to Play Directly with BCLC]

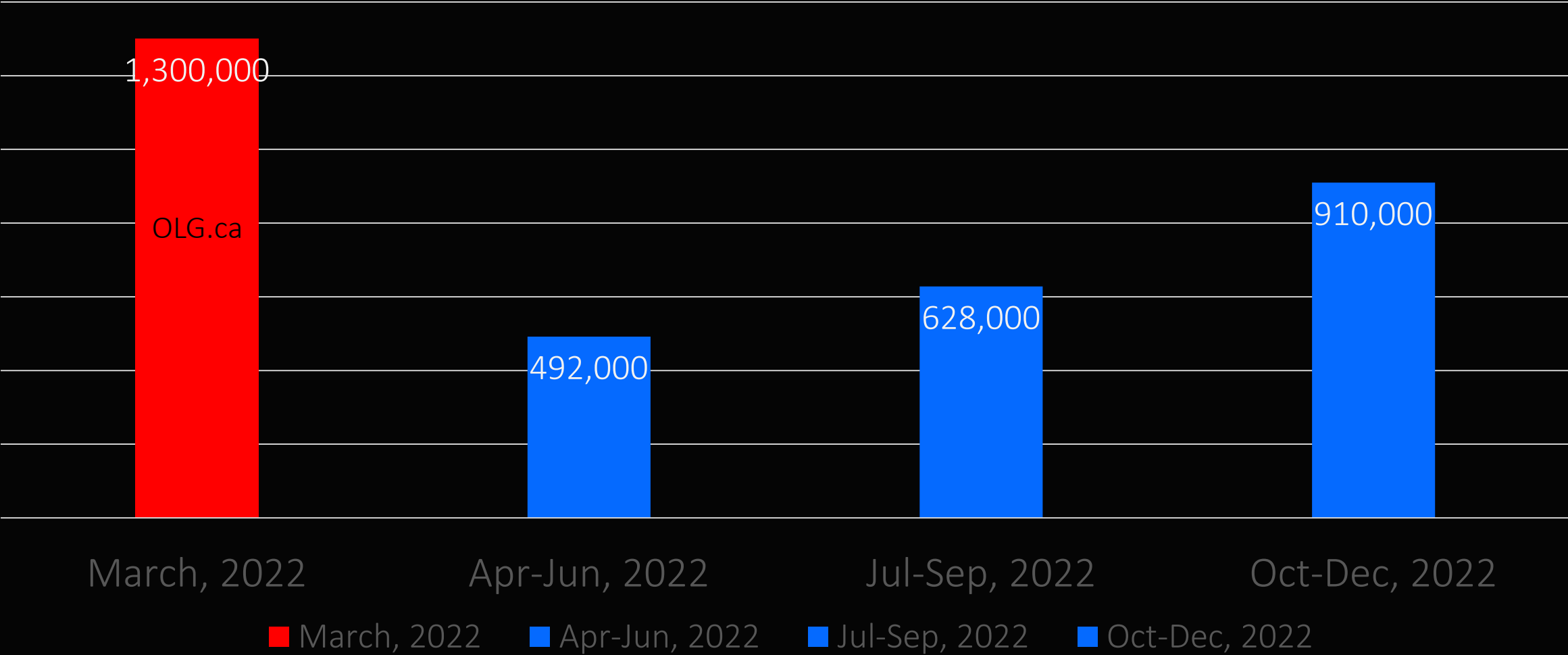


Source: *BCLC Annual Reports.*

iGaming Ontario -- Participants & Registered Users



Participants: Accounts with Activity, OLG.ca & iGaming Ontario, 2022



Source: iGaming Ontario Quarterly Reports & OLG Annual Report.

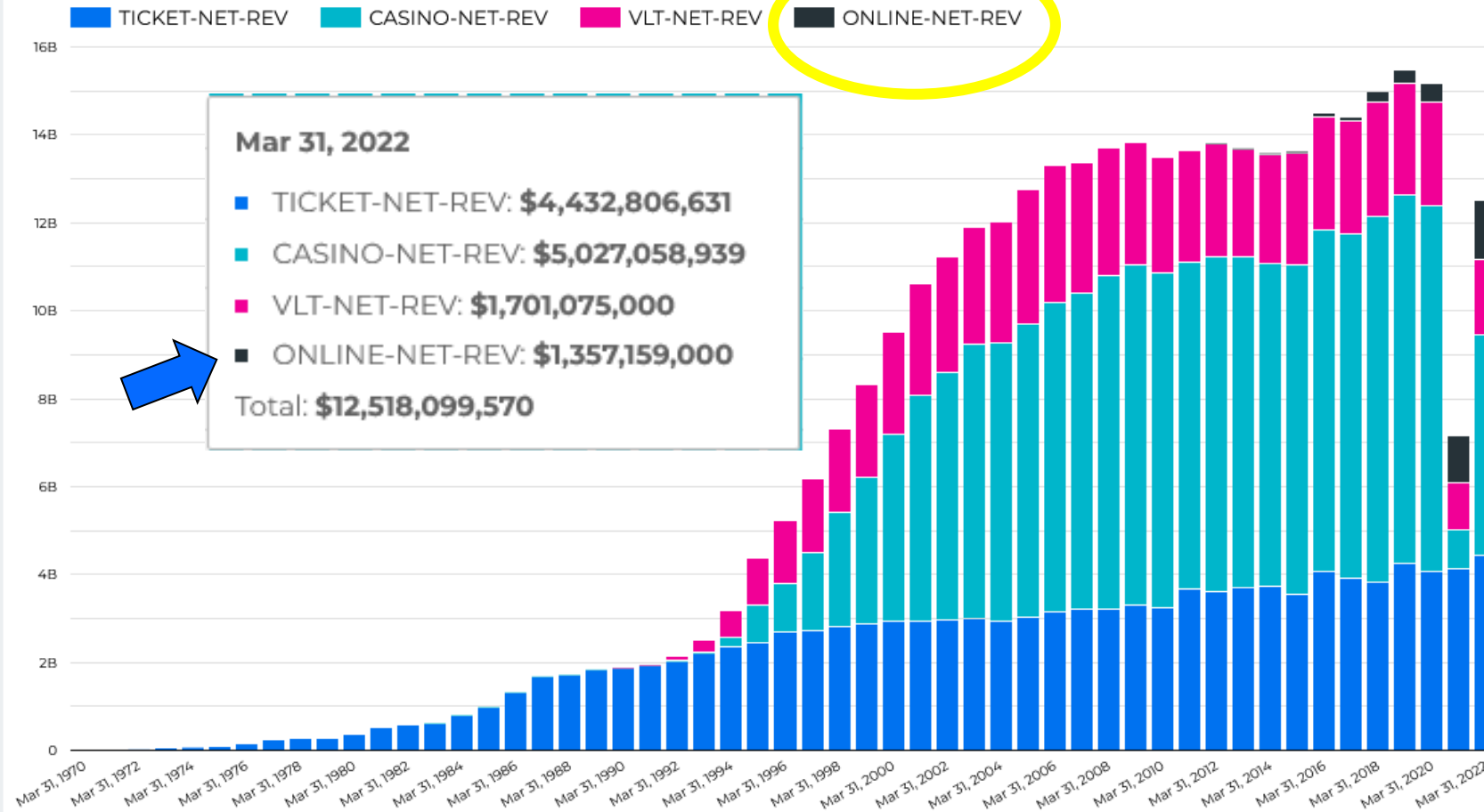


Revenue from provincially- regulated online gambling

Net Revenue & Net Income

Canada Commercial Gambling Net Revenue by Source by Year

PROVINCE



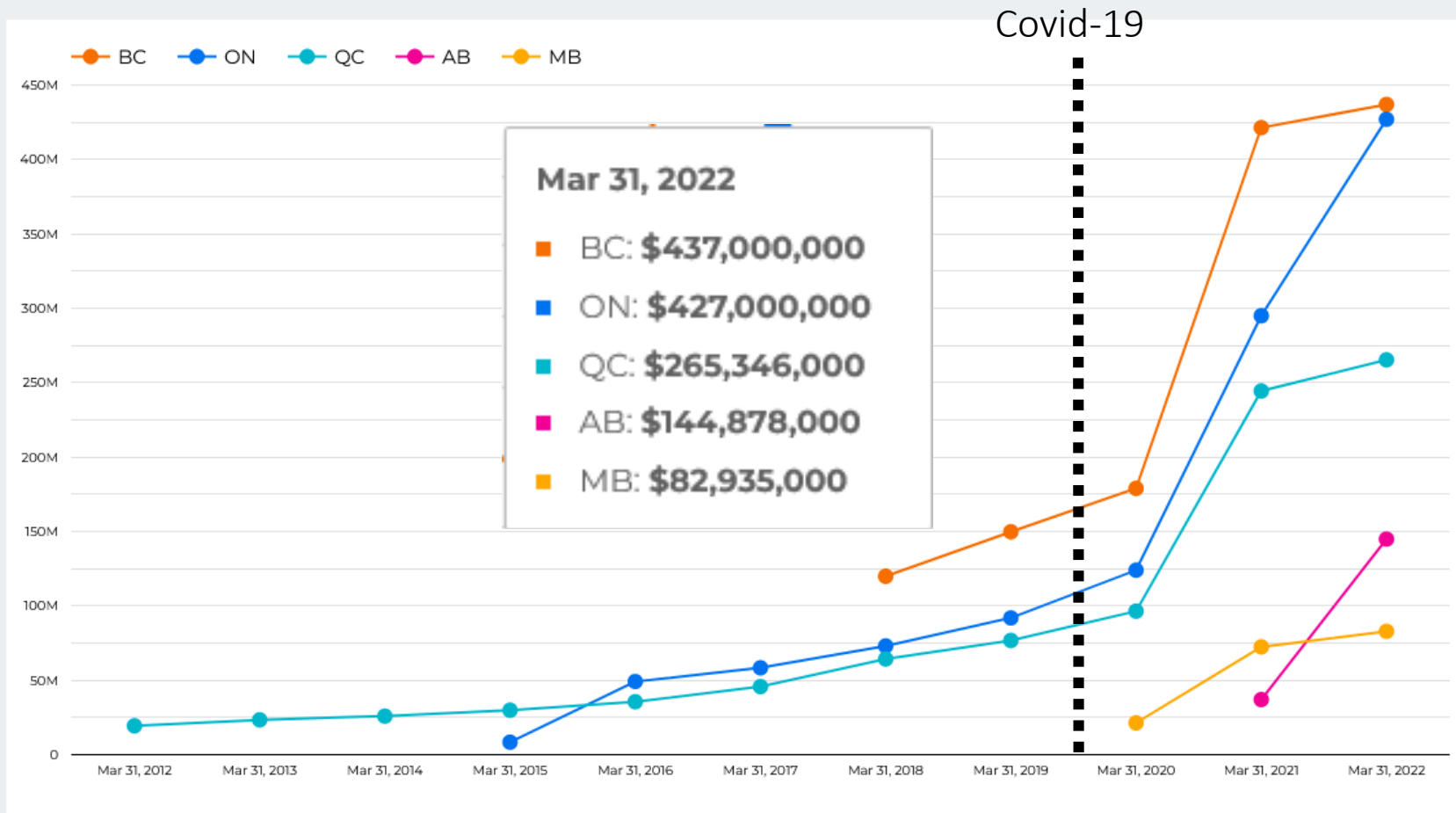
CASINO-NET-REV figure for ON from 2017/18+ excludes deduction of gaming service provider fees (making it comparable with previous years); Only ON, BC, QC, AB (from 2020-21), MB (from 2019-20) separately report ONLINE-NET-REV; Figures for not available for all provinces / all time periods. Aggregated provincial net revenue totals by gambling format do not equal COMM-NET-REV due to other income & expenses included in provincial reporting.

Canada Online Gambling Net Revenue by Province/Territory by Year

PROVINCE

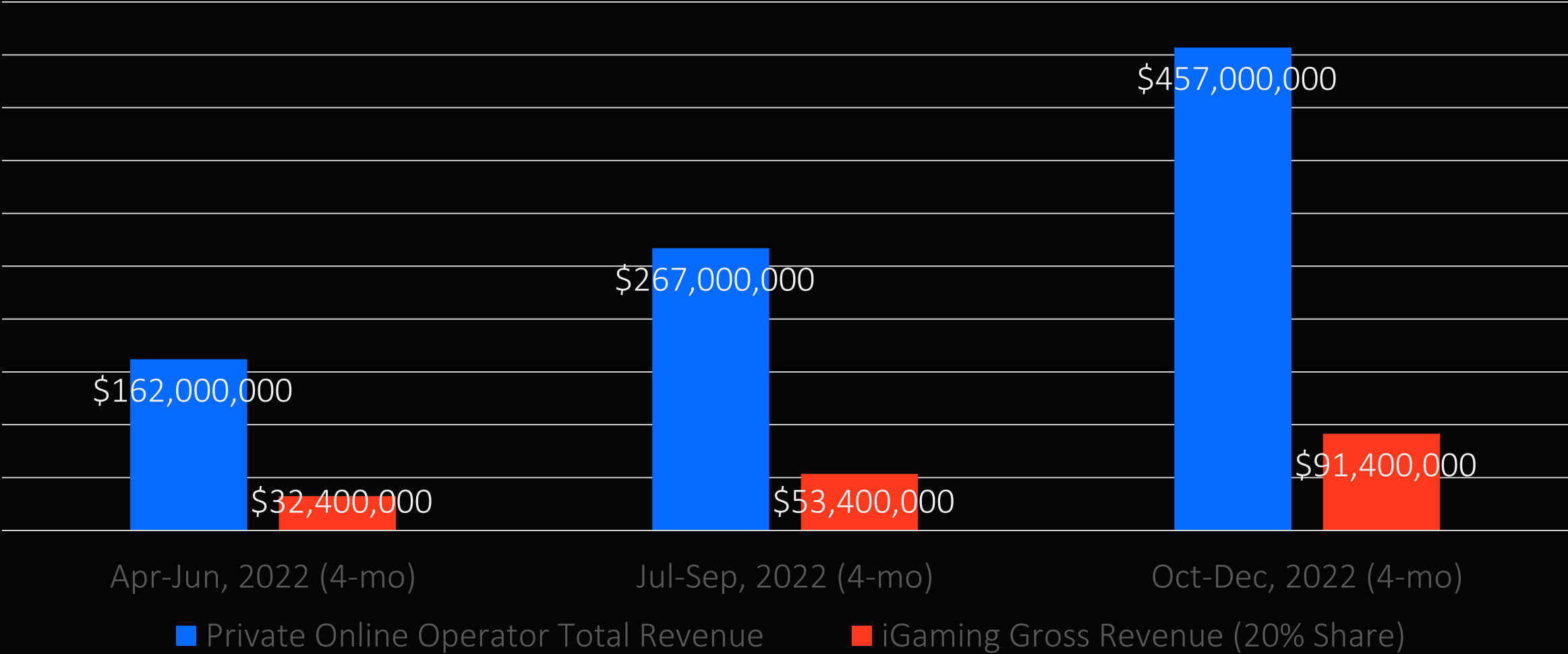
DATE

Figures show revenue trends but are not directly comparable between provinces due to differences in provincial reporting.



Online Gambling is available in several other provinces but is not always reported separately from net revenue generated by other formats (e.g., ticket lottery, casino gambling). Online Gambling Net Revenue was only recently separated from other revenues in some provinces (e.g., BC from 2017/18); BC figures are eGaming only excluding lottery; ON figures from 2019/20 include lottery products sold online; QC figures are for Online Casino Gaming excluding lottery, MB (from 2019/20), AB (from 2020/21).

Revenue: Private Operators Ontario & iGaming “Share”



Source: OLG Annual Report 2021-22 & iGaming Ontario Quarterly Reports.

Canada Online Gambling Net Income by Province/Territory by Year

PROVINCE

DATE: Exclude Mar 31, 2015, Ma... (4)

Figures show revenue trends but are not directly comparable between provinces due to differences in provincial reporting.

Covid-19



Online Gambling is available in several other provinces but is not always reported separately from net income generated by other formats (e.g., ticket lottery, casino gambling). Online Gambling Net Income is separately reported by ON; ON figures from 2019/20 include lottery products sold online; BC (from 202/21), MB (from 2019/20), PE (from 2020/21), NB (from 2020/21).

Spending & Revenue

- Does online gambling cannibalize spending in land-based venues?
- Will iGaming Ontario cannibalize the OLG.ca online casino and its sports betting?

ONLINE GAMING

For the 2021–2022 fiscal year, revenues from lotoquebec.com (lottery and casino games combined) totalled \$390.9 million, an increase of \$22.6 million (+6.1%) compared to 2020–2021. Revenues from the website represented 17.6% of Loto-Québec's total revenues, while they accounted for only 5.0% in 2019–2020.

Many consumers continued to play online—even though they could still buy lottery tickets at retail locations throughout the year and casinos and gaming halls were open for more days than in 2020–2021. Efforts to enhance the website to ensure its competitive edge, especially vis-à-vis illegal gambling websites, contributed significantly to the continued growth of online gaming revenues.

What's Next?

- Will iGaming Ontario impact online gambling in other provinces being run by provincial operators?
- Will the Mohawk Council of Kahnawà:ke challenge against iGaming Ontario succeed?

Kahnawake challenging Ontario on iGaming



NEWS PROVIDED BY
[Mohawk Council of Kahnawake →](#)
Nov 28, 2022, 12:03 ET

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KAHNAWAKE – KENTENHKÓ:WA, QC, Nov, 28, 2022 /CNW Telbec/ – The Mohawk Council of Kahnawà:ke (MCK) today launched a constitutional challenge against iGaming Ontario and the Attorney General of Ontario over the provincial government's unilateral changes to the way gaming is managed.


It says the changes are illegal and unconstitutional and is contesting Ontario's re-interpretation of Section 207 (1) of the Criminal Code, which permits provinces to regulate single-event sports betting. MCK's legal challenge asserts that iGaming Ontario is not "conducting or managing" the gaming that takes place on private operators' sites.


Instead, iGaming is allowing operators to conduct and manage themselves, subject to the payment of a portion of their revenues to Ontario.



Thank You

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<https://research.ucalgary.ca/alberta-gambling-research-institute> 