

# Ontario iGaming Market Channelization

April 15, 2025



AGCO

Alcohol and Gaming  
Commission of Ontario



## BACKGROUND

On April 4, 2022, the Ontario provincial government opened a competitive, regulated iGaming market in the province. This enabled eligible private gaming operators to register with the Alcohol and Gaming Commission of Ontario (AGCO) and contract with iGaming Ontario (iGO), to participate in Ontario's legal gaming market. Prior to this launch, the Government of Ontario estimated that 70% of online gambling was taking place on unregulated sites.<sup>1</sup>

Having a regulated iGaming market means the provincial government qualifies the organizations that may operate legally, making sure that they are held to established standards of operator and game integrity, offer the necessary player protections, and contribute to provincial revenues.

## STUDY PURPOSE

Commissioned initially in 2023, and continued in 2024 and 2025, the AGCO and iGO tasked Ipsos with evaluating the channelization rate within Ontario's iGaming sector. The primary objective of this study was to monitor the transition of online gambling activities from unregulated to regulated platforms among Ontarians. This assessment involved analyzing which websites and apps were being used by online gamblers, thereby categorizing users based on whether the gambling sites were regulated.

The 2024 results indicated a modest increase with 86.4% of recent online gamblers in Ontario having participated on regulated websites, compared to 85.3% in 2023. The purpose of the study in 2025 is to continue using the same methodology to assess whether there is a further shift in channelization.

## STUDY METHODOLOGY

The results reported herein were obtained from an Ipsos survey collected from January 30 to February 19, 2025.

For this survey, a total sample of 2,003 Ontarians aged 19+ were interviewed. This included a general population sample of 1,000 Ontarians, with an additional sample boost of 1,003 Ontarians who gambled or wagered real money bets online in the past three months. Quotas and weighting were employed to ensure that the general population sample's composition reflects that of the Ontario population according to census parameters. This resulted in a total sample of 1,376 Ontarians who gambled or wagered real money bets online in the past three months.

The precision of Ipsos online surveys is measured using a margin of error. In this case, the results are accurate to within  $\pm 2.2$  percentage points, 19 times out of 20, had all Ontarians aged 19+ been polled.

The margin of error will be wider among subsets of the population, for example, among past three-month online gamblers (n=1,376) the margin of error is  $\pm 2.6$  percentage points. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

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<sup>1</sup> <https://news.ontario.ca/en/release/1000471/ontario-creating-a-safe-legal-and-competitive-online-gaming-market>

## OVERALL RESULTS

*At a total of 83.7% in 2025, the Ontario iGaming market continues to achieve a high rate of legal/regulated play.*

Ipsos’ survey results found that a large majority of online gamblers in Ontario continue to play on regulated iGaming sites. Specifically:

- 83.7% of respondents who have gambled online in Ontario over the past three months report having wagered on a regulated website.
- 16.3% of respondents who have gambled online in Ontario over the past three months report having wagered only on unregulated websites.

Further, among the 83.7% who are using regulated websites, Ipsos’ study found that 20.2% have wagered on a combination of regulated and unregulated websites.

Ipsos’ survey results were also able to determine the prevalence of online gambling in Ontario. Using a census representative sample of n=1,000 respondents, the study concluded:

- 43.9% of Ontario residents have gambled online in the past year.
- 38.5% of Ontario residents have gambled online in the past three months.
- 31.5% of Ontario residents have gambled online in the past month.

Using the census weighted general population sample, some key demographics of Ontarians who have gambled or wagered real money bets online in the past three months are listed below:

AGE	
19-34	40.3%
35-54	40.6%
55+	19.1%
GENDER	
Male	59.3%
Female	40.7%
EDUCATION	
High School or Less	42.6%
Some University	27.3%
University Degree+	30.1%
HOUSEHOLD INCOME	
Less than \$75k	55.8%
\$75k+	44.2%

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Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

"Game Changers" – our tagline – summarizes our ambition to help our 5,000 clients navigate with confidence our rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120, Mid-60 indices, STOXX Europe 600 and is eligible for the Deferred Settlement Service (SRD).

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