



Report:
Ontario iGaming Market Channelization

Prepared for:



AGCO | Alcohol and Gaming
Commission of Ontario



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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.¹

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

The AGCO and iGO commissioned Ipsos to investigate the rate of channelization in the iGaming sector in Ontario, which is to say the degree to which Ontarians are shown to be shifting their online gambling activity from unregulated to regulated sites.

The specific goal of the research was to assess which websites and/or apps online gamblers report using. This data would then be used to codify users into groups depending on whether the gambling sites reported are legal/regulated or not.

Study Methodology

The results reported herein were obtained from an Ipsos survey collected from February 28 to March 13, 2023.

For this survey, a total sample of 1,850 Ontarians aged 19+ was interviewed. This included a general population sample of 1,000 Ontarians, with an additional sample boost of 850 Ontarians who gambled or wagered real money bets online in the past three months.

This resulted in a total sample of 1,170 Ontarians who gambled or wagered real money bets online in the past three months. Quotas and weighting were employed to ensure that the sample's composition reflects that of the Ontario population according to census parameters.

The precision of Ipsos online surveys is measured using a margin of error. In this case, the results are accurate to within ± 2.3 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=1,170) the margin of error is ± 2.9 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.

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

Overall Results

At a total of 85.3%, the Ontario iGaming market has achieved a high rate of legal/regulated play.

Ipsos' survey results found that a large majority of online gamblers in Ontario are now playing on regulated iGaming sites. Specifically:

- 85.3% of respondents who have gambled online in Ontario over the past three months report having wagered on a regulated website.
- 14.7% of respondents who have gambled online in Ontario over the past three months report having wagered only on unregulated websites.

Further, among the 85.3% who are using regulated websites, Ipsos' study found that 19.5% 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:

- 38.8% of Ontario residents have gambled online in the past year.
- 33.1% of Ontario residents have gambled online in the past three months.
- 24.6% of Ontario residents have gambled online in the past month.

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	45.8%
35-54	36.7%
55+	17.5%

Gender	
Male	61.8%
Female	37.2%
Other	1.0%

Education	
High School or Less	24.8%
Some University	35.7%
University Degree+	39.5%

Household Income	
Less than \$75k	54.9%
\$75k+	45.1%

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