



Report:
**Ontario iGaming Market
Channelization**

Prepared for:



AGCO

Alcohol and Gaming
Commission of Ontario



iGaming 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

In 2023, 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. Results of that study showed that 85.3% of recent (past three months) online gamblers in Ontario had recently gambled on a regulated website. The purpose of the study in 2024 was to run the same study with the same methodology to see if there was a shift in channelization.

STUDY METHODOLOGY

The results reported herein were obtained from an Ipsos survey collected from January 29 to February 15, 2024.

For this survey, a total sample of 2,016 Ontarians aged 19+ were interviewed. This included a general population sample of 1,009 Ontarians, with an additional sample boost of 1,007 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 1,299 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 ± 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=1,299) the margin of error is ± 2.7 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 86.4% in 2024, 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:

- 86.4% of respondents who have gambled online in Ontario over the past three months report having wagered on a regulated website.
- 13.6% of respondents who have gambled online in Ontario over the past three months report having wagered only on unregulated websites.

Further, among the 86.4% who are using regulated websites, Ipsos' study found that 19.9% 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=1,009 respondents, the study concluded:

- 35.2% of Ontario residents have gambled online in the past year.
- 29.5% of Ontario residents have gambled online in the past three months.
- 20.3% 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	38.7%
35-54	42.5%
55+	18.8%

Gender	
Male	64.5%
Female	35.5%

Education	
High School or Less	31.9%
Some University	30.0%
University Degree+	38.1%

Household Income	
Less than \$75k	52.5%
\$75k+	47.5%

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