

Hit or Miss?

Switzerland

As one of the wealthiest nations in Europe, Switzerland's independent and autonomous stature makes it the popular kid in the European playground, despite it not even being a team member. Its impartiality is a trademark, whilst its progressive nature means it is often a benchmark for innovative ideas. Three years after Switzerland loosened its gambling regulations to permit online gambling, giving licences to land-based casinos, we take a look at how this has developed and evolved.

Historically, Switzerland's gambling industry has been strictly regulated. All types of gambling were officially banned in Switzerland in 1921 and this lasted until 1993. Lotteries were later given authorisation to operate within certain cantons if revenues were given to public benefit charities. This saw the 1923 Lottery Act introduced which was later extended to include sports betting.

The Casino Act 1998 came into force in April 2000 which lifted the ban on casinos and the majority of the casinos opened between 2002 and 2003. They came with a 20-year gaming licence with only one casino in each of the regional gambling zones.

At present there are 21 casinos in 23 zones, plus 11 licence extensions (online gambling). The casinos are private companies and operate under concessions dished out by the Swiss Federal

Council (CMFJ). The country's gambling industry expanded and developed merrily under this legislation until the new kid on the block, online gambling, appeared on the scene.

Switzerland's strict regulatory regime in place, which prohibited the operation of online gaming in Switzerland, drove many Swiss players to access services provided from offshore operators.

Casinos began to lose revenues to the increased activity at online casinos coupled with illegal gambling clubs popping up in the country. Swiss casinos claimed they hadn't been profitable since 2007 with revenues reportedly dropping by around 4.1 per cent year on year.

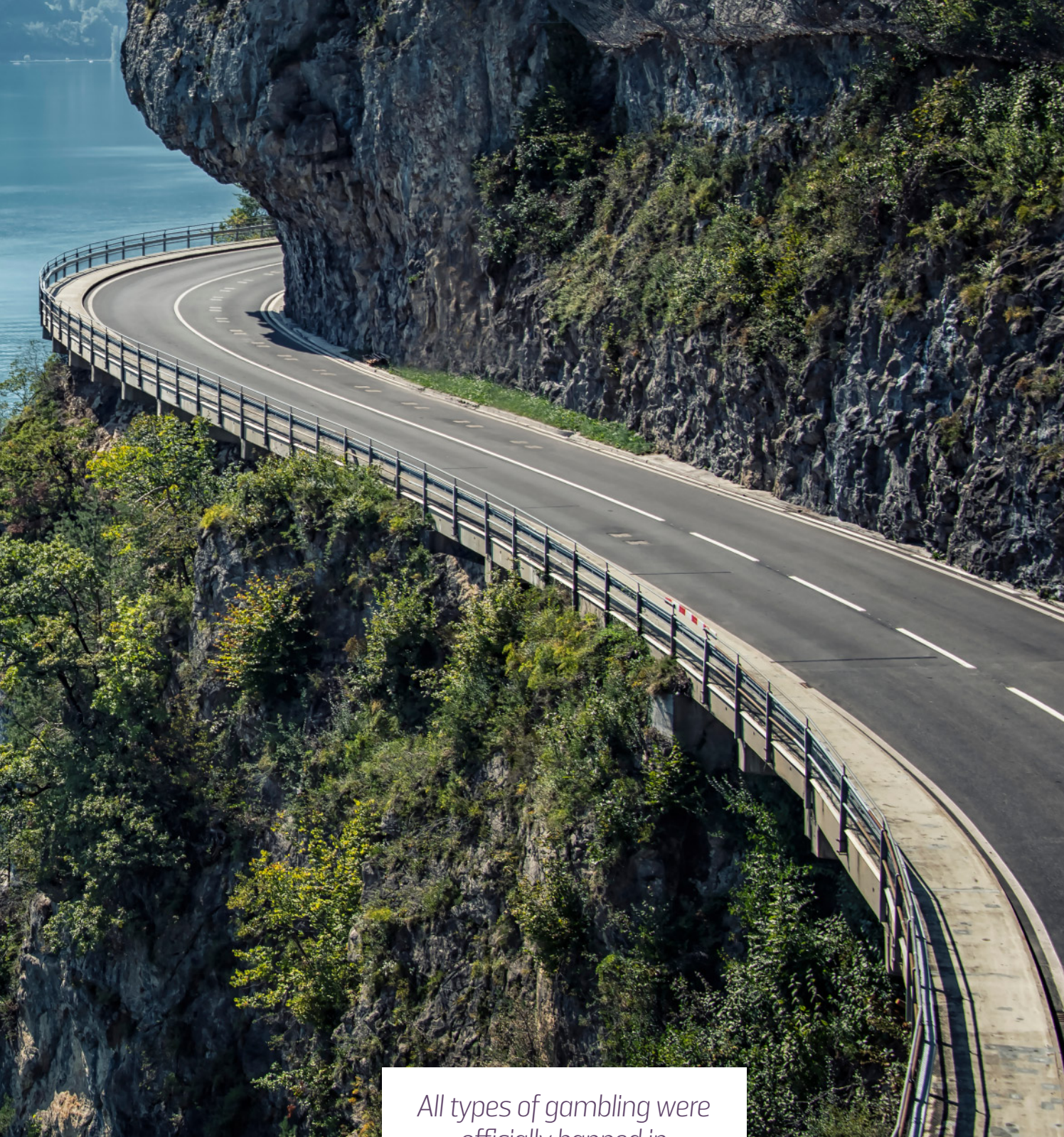
And so, Switzerland went back to the drawing board.

THE NEW GAMING ACT

The new law on gambling actually dates back to 2009 when it was first discussed and the initiative 'For Gambling for the Common Good' was filed with the Federal Chancellery. In 2010 the proposal was rejected and a counterproposal was released later that year.

In 2012 the proposal was voted on and a year later the Federal Council outlined the future gambling legislation. A preliminary draft was released in 2014 for consultation followed by a series of parliamentary deliberations.

In 2018, a request for a referendum against the new law was announced which began in March of that year but almost 73 per cent voted in favour and the new Federal Law on Gambling (LJA) came into force on January 1 2019.



The Gaming Act is complemented by a federal secondary law, cantonal law and inter-cantonal law. The Swiss Federal Council is the regulator for casinos whilst GESPA is the inter-cantonal regulator for lottery, sports betting, and skill games.

The LJAr replaced the Gambling Houses Act of 1998 and the Lotteries Act of 1923 and its primary aim was to:

- Provide protection against excessive gambling and problems relating to gambling.
- To ensure the safe and transparent operation of gambling.
- To ensure net profits from lottery and betting games are transparent and allocated for social purposes.

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- To ensure part of the proceeds from casino gambling is allocated to old age, survivors', and disability insurance programmes.

The LJAr maintained the current system of granting state authorisations and concessions to a limited number of operators but it introduced several new elements.

The biggest change was it authorised the operation of online casino games such as poker, blackjack, roulette, and slots, which had been previously prohibited, by giving casinos the ability to apply for an extension of their concession to add this operation.

Lottery companies were able to offer new forms of sports betting and small poker tournaments could now be held outside of casinos (with limited stakes).



The Federal Office of Justice is responsible for the gambling law and during the first half of 2019 the Federal Council had to decide on requests for concession extensions whilst the blocking of unauthorised websites came into force six months later in July 2019 – once the initial concessions were in place.

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The LJAr includes the following points:

- Anyone wishing to operate casinos games must hold a licence.
- The concession allows for the operation of casino games within the gaming house. An extension to this licence, to operate online casinos games, can also be granted.
- Concessions can only be granted if applicant is:
 - A public limited company under Swiss Law whose share capital is divided into registered shares.
 - Presents a programme of security measures and social measures.
 - Presents profitability calculations to ensure

- casinos are economically viable.
- Sets out measures to ensure correct taxation.
- Establishes a report of the economic usefulness of the casino for the region.
- Must be of good reputation and provide funding from legal origins.
- Must be accepted by the canton and municipality who vote in favour of the casino.
- Online casino concessions are granted if the applicant fulfils the conditions above. Online games must have been designed by a manufacturer with a valid IT security management ISO-27001 certification standard.
- The Federal Council sets the number of concessions. The number and type of games offered in Type B concessions may be limited alongside stake and winnings and operating conditions for jackpot systems.
- Casinos must be distributed evenly between regions.

- Casinos may operate: slots, automated gaming, roulette, blackjack, punto banco, baccarat, poker, stud poker, sicbo, craps etc.
- Gambling operators are required to respond appropriately to protect players against gambling addiction and excessive gambling. Minors must be particularly protected and cannot have access to casino games or large-scale games operated online.
- To access online games a gaming account is required and to open such an account players must be over 18 years of age, a Swiss resident and not banned from gambling.
- Operators must identify the online player and winnings can only be transferred into accounts in the name of the player. Players must set loss limits from the outset and be able to control their playing options.
- Advertising is also regulated and is permitted for regulated gambling offer but not for unlicensed foreign and domestic gambling. Advertising has some limitations, such as it cannot target minors or be misleading about chances of winning.

Reports

SWITZERLAND - UPDATE



GAMBLING TAX

A progressive tax on GGR is applied in Switzerland and this is earmarked for old age, survivors', and disability insurance' (AVS). Gambling tax is the second highest in all of Europe (after France).

The basic tax rate is:

1. Land-based casinos pay between 40 per cent and 80 per cent of the GGR on games. The 40 per cent is levied up to a limit of CHF10m and then increased by 0.5 per cent per additional million francs up to 80 per cent on a GGR of CHF90m.
2. Online casinos pay between 20 per cent and 80 per cent of the GGR. The 20 per cent is levied up to a limit of CHF3m which is increased in five steps to a maximum of 80 per cent on a GGR of CHF500m.

Type B casinos pay 60 per cent tax to the AVS and 40 per cent to the canton whilst Type A casinos pay 100 per cent to the AVS.

The tax rate can be reduced by up to half during the first four years of operation and when setting the rate the Federal Council takes into account the economic situation of the casino. The reduction is redefined each year.

Land-based taxes by casinos paid in in 2021 amounted to CHF272.8m. In 2020 the taxes amounted to CHF198m (44.6 per cent less than 2019 with CHF357m).

Online gambling taxes brought in a total of CHF78m (compared to CHF7.5m in 2019) in 2020 and CHF99.6m last year.

Winnings from land-based casinos are tax exempt whilst gambling winnings from licensed online casinos up to CHF1m are also tax exempt. Winnings from lottery, skill games, raffles are tax exempt up to CHF1,000 per tax year.

LAND-BASED CASINOS

Switzerland currently has 21 licensed casinos of which eight hold a Type A concession and 13 hold a Type B concession. The main differences between the two are that:

- Type B are usually casinos for spa or resort casinos with a limited number of table games (three types) and slot machines with limited stakes. They can only accept maximum bets of CHF25 for slots and no connected jackpots.
- The cantons where Type B are located may levy an additional canton tax for games (not online games). This tax cannot represent more than 40 per cent of the tax levied on casinos which goes to the state.
- Type A casinos have no limits on stakes, or the





number of games and slots offered. They can offer connected jackpots and maximum winnings possible. Only Type A casinos can qualify as a Grand Casino.

At the end of 2021, the 21 casinos offered 264 tables games on a total of 250 gaming tables of which 91 were roulette, 71 blackjack, 73 poker and 29 other games. The casinos operated 4,571 slots between them and see on average 4.8 million visitors each year.

Land-based casinos have obviously had a couple of years of disruptions due to Covid restrictions. In 2020 the casinos were forced to close for almost five months depending on the canton and GGR decreased by more than 39 per cent that year.

Even when the casinos reopened there were restrictions in the number of players through the doors, whilst bars and restaurants also had

amounted to CHF1.44bn made up of casinos, skill games and large-scale games operated by two companies – SwissLos and Loterie Romande (lotteries and sports betting) and small games (such as small-scale lotteries, poker tournaments or local sports betting).

The land-based casino sector GGR in 2020 amounted to CHF452m – 39 per cent less than 2019 figures (CHF742.5m) due to Covid restrictions/closures.

This GGR was dominated by slots with CHF345.4m (just over 85 per cent share) with table games making up the CHF66.1m remainder.

In 2021 GGR for the land-based casinos sector reached CHF405m – still a 45 per cent decrease on 2019 (pre-pandemic) revenues and a 10 per cent decrease on 2020 figures.

Total gambling GGR in Switzerland in 2020 amounted to CHF1.44bn made up of casinos, skill games and large-scale games operated by two companies – SwissLos and Loterie Romande (lotteries and sports betting) and small games (such as small-scale lotteries, poker tournaments or local sports betting).

operational restrictions placed on them. A Covid certification requirement was introduced in the autumn of 2021 which resulted in further shortfalls in revenues during November and December. Those casinos in tourist resorts or near a border also had less foreign visitors due to travel restrictions.

For example, Casino Interlaken had to close completely for 143 days and could only operate on limited offer for a further 132 days and saw a drop in sales of almost 50 per cent.

Total gambling GGR in Switzerland in 2020

Meanwhile at the end of 2024 all 21 casino licences to date will expire and a new tender process began in May this year and is due to be awarded in autumn next year. Two additional Type A gaming zones in Lausanne and Winterthur have been created. The condition is that the casinos must generate a GGR of more than CHF30m annually for its land-based operation.

A report by the CMFJ believes the casino landscape in Switzerland at present is “characterised by a large number of differently positioned establishments with attractive

By the end of 2021, 11 of the 21 land-based casinos had extended their concession to include online gambling which offered a total of 3,733 online casino games (3,197 slots and 536 table games). Two casinos (Casino Davos and Casino Zurich) offer poker games in cooperation with a foreign operator.

ONLINE CASINO TAXES 2019-2021

CASINO	TAXES 2019	TAXES 2020	TAXES 2021
Baden	CHF1.77m	CHF15.54m	CHF18.2m
Bern	-	CHF237,977	CHF0.5m
Davos	CHF278,797	CHF5.12m	CHF9.5m
Interlaken	-	CHF4.32m	CHF3.9m
Lucerne	CHF3.13m	CHF32.6m	CHF35.7m
Meyrin	-	CHF63,586	CHF1.6m
Pfaffikon	CHF2.26m	CHF20.1m	CHF29.6m
Montreux	-	-	CHF0.005m
Basel	-	-	CHF0.017m
Neuchatel	-	-	CHF0.3m
Lugano	-	-	CHF0.4m
TOTAL	CHF7.45m	CHF78m	CHF99.6m

gaming and additional offers. With a balanced regional distribution, they cover the market in the cities, regions and tourist and border areas. Since they started operating in 2002/2003 the casinos have paid taxes totalling CHF7.3bn of which CHF6.2bn has gone to the AVS and CHF1.05bn to the cantons where the Type B casinos are located."

ONLINE CASINOS

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The number of active online player accounts across all casinos at the end of 2021 was around 200,000 (130,000 by end 2020).

Revenues for the online gambling sector has been steadily increasing. In 2019, the four online casinos in operation saw revenues of CHF23.5m whilst in 2020 there were seven online casinos in operation with a GGR of CHF186.8m. Online gambling revenues last year reached CHF234m with 11 online casinos operational.

A total of six online gambling extension licences were granted in 2019 and the first four casinos to receive an extension in June 2019 were: Casinos Baden, Lucerne, Pfaffikon and Davos followed by Interlaken and Bern in November (launching in 2020).

Three online extensions were granted in 2020 (Meyrin, Lugano and Neuchatel) and a further two in December 2021 (Basel and Montreux).

In 2019, only one casino offered 'live' table games, and this rose to five (out of seven online casinos) in 2020 whilst in November 2020 the CFM approved the first poker game.

The online casino games offered are online slots and live table games. In order to hold poker games online the casino can collaborate with a foreign operator upon request. Each casino that plays online games must be equipped with a data recording system located in Switzerland.

The online gambling partners currently operating in Switzerland include:

The Gamanza Group which was incorporated in 2019 following an investment from Stadtcasino Baden for its online casino operation. Gamanza developed its GaminGenius Platform and CRM

and launched its first legal online casino in Switzerland via Casino Baden's jackpots.ch site. The company has since gone on to sign five more long term deals with other land-based casino clients - Casino Neuchatel, Casino Bern, Casino Montreux, Casino Basel and Casino Meyrin. Last year, Gamanza was acquired fully by its investors and became part of the Stadtcasino Baden group of companies.

Playtech launched its casino and live casino into Switzerland with the Swiss Casino Group in 2019 via Casino Pfaffikon's online site myschweizcasino.ch followed by its iPoker network a year later. Playtech later partnered with Casino Lugano to launch its swiss4win.ch online site in March 2021.

PAF was chosen as technology partner by Grand



ONLINE CASINO GGR 2019-2021

CASINO	ONLINE LAUNCH DATE	GGR 2019	GGR 2020	GGR 2021
Baden	July 2019	CHF6.34m	CHF38.48m	CHF43.4m
Bern	Sept 2020	-	CHF1.16m	CHF2.3m
Davos	Sept 2019	CHF1.34m	CHF16.7m	CHF26.5m
Interlaken	Feb 2020	-	CHF14.1m	CHF13.7m
Lucerne	Aug 2019	CHF8.93m	CHF68.99m	CHF74.3m
Meyrin	Nov 2020	-	CHF317,930	CHF6.9m
Pfaffikon	Sept 2019	CHF6.87m	CHF46.9m	CHF63.7m
Montreux	Dec 2021	-	-	CHF26,276
Basel	Dec 2021	-	-	CHF85,434
Neuchatel	July 2021	-	-	CHF1.4m
Lugano	March 2021	-	-	CHF2m
TOTAL		CHF23.49m	CHF186.8m	CHF234.4m



Casino Luzern to launch its online site mycasino.ch in 2019 whilst Technospin operates the Casino 777 brand via Casino Davos.

Novomatic's interactive division, Greentube, launched into Switzerland in 2020 with the platform for Casino Interlaken's starvegas.ch, whilst also launching a collection of titles with the online brand.

Each online game must be verified by an approved institute which confirms all the technical requirements provided by Swiss legislation. The CFMJ recognises those laboratories if they have an accreditation granted by an organisation that has signed a multilateral agreement with international organisations such as the IAF.

Bodies approved include: BMM Testlabs, eCOGRA, Gaming Associates Europe, GLI Austria, GLI Europe, GLI UK, iTech Labs, Quinel Ltd, SIQ and Trisigma.

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There are a range of games on the market and the online casino game approved providers includes (as of March 2022):

ISB Technology, PAF Consulting, Playtech Software, Red Tiger Gaming, Derivco Ltd, Greentube, Evolution Gaming, Gamanza Group, Ice Elite, Dopamine, FAZI, Casino Technology, Gaming 1, EGT Interactive, NetEnt Product Services, GameArt Ltd, Play n Go Malta, PariPlay, Oryx Gaming International, GMS Entertainment Ltd, OU Playtech Estonia, Anakatech, Skywind Holdings, Stakelogic, Wazdan Ltd, Yggdrasil Gaming, GMS Entertainment, Holle Games, ISB Magma, CT Gaming, COGG Studios, EveryMatrix, Pragmatic Play, Playson Ltd, Euro Live Technologies, TSG Interactive, The Stars Group.

As all the concessions and the extensions expire on December 31 2024 the Federal Council needs to re-award the concessions.

Gerhard Pfister, President of the Swiss Casino

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SWITZERLAND CASINOS

GRAND CASINO BADEN

Concession type:	A
Majority shareholder:	Stadtcasino Baden
Table games:	22
Slots:	333
Online gaming licence:	June 2019
Start of online gaming:	July 2019
Online casino games:	677
Website:	grandcasinobaden.ch
Online website:	jackpots.ch
Online partner:	Gamanza

BAD RAGAZ

Concession type:	B
Majority shareholder:	Grand Resort Bad Ragaz
Table games:	5
Slots:	122
Online gaming licence:	-
Website:	resortragaz.ch

BASEL (AIRPORT CASINO)

Concession type:	A
Majority shareholder:	Compagnie Finanziere Regionale
Table games:	13
Slots:	300
Online gaming licence:	Aug 2021
Start of online gaming:	Dec 2021
Online casino games:	80
Website:	grandcasinobasel.com
Online website:	goldengrand.ch
Online partner:	Gamanza

GRAND CASINO KURSAAL BERN

Concession type:	A
Majority shareholder:	Congress & Kursaal Bern
Table games:	16
Slots:	327
Online gaming licence:	Nov 2019
Start of online gaming:	Sept 2020
Online casino games:	62
Website:	grandcasino-bern.ch
Online website:	7melons.ch
Online partner:	Gamanza

COURRENDLIN (Casino du Jura)

Concession type:	B
Majority shareholder:	Groupe Lucien Barriere
Table games:	5
Slots:	121
Online gaming licence:	-
Website:	lucienbarriere.com

CRANS-MONTANA

Concession type:	B
Majority shareholder:	Circus Casino France
Table games:	6
Slots:	122
Online gaming licence:	-
Website:	casinocransmontana.com

CASINO DAVOS

Concession type:	B
Majority shareholder:	Casino de Spa
Table games:	4
Slots:	60
Online gaming licence:	June 2019
Start of online gaming:	Sept 2019
Online casino games:	626 + Poker Stars
Website:	casinodavos.ch
Online website:	casino777.ch
Online partner:	Techno Spin

CASINO FREIBURG, GRANGES PACCOT

Concession type:	B
Majority shareholder:	Groupe Lucien Barriere
Table games:	6
Slots:	156
Online gaming licence:	-
Website:	casinosbarriere.com

INTERLAKEN

Concession type:	B
Majority shareholder:	Kursaal Congress Centre
Table games:	4
Slots:	131
Online gaming licence:	November 2019
Start of online gaming:	Feb 2020
Online casino games:	254
Website:	casino-interlaken.ch
Online website:	starvegas.ch
Online partner:	Greentube

CASINO LOCARNO

Concession type:	B
Majority shareholder:	Ace Casino Holding
Table games:	5
Slots:	158
Online gaming licence:	-
Website:	casinolocarno.ch

CASINO LUGANO

Concession type:	A
Majority shareholder:	City of Lugano
Table games:	30
Slots:	500
Online gaming licence:	April 2020
Start of online gaming:	March 2021
Online casino games:	194
Website:	casinolugano.ch
Online website:	swiss4win.ch
Online partner:	Playtech

GRAND CASINO LUZERN

Concession type:	A
Majority shareholder:	Kursaal Casino
Table games:	14
Slots:	261
Online gaming licence:	June 2019
Start of online gaming:	August 2019
Online casino games:	754
Website:	grandcasinoluzern.ch
Online website:	mycasino.ch
Online partner:	PAF

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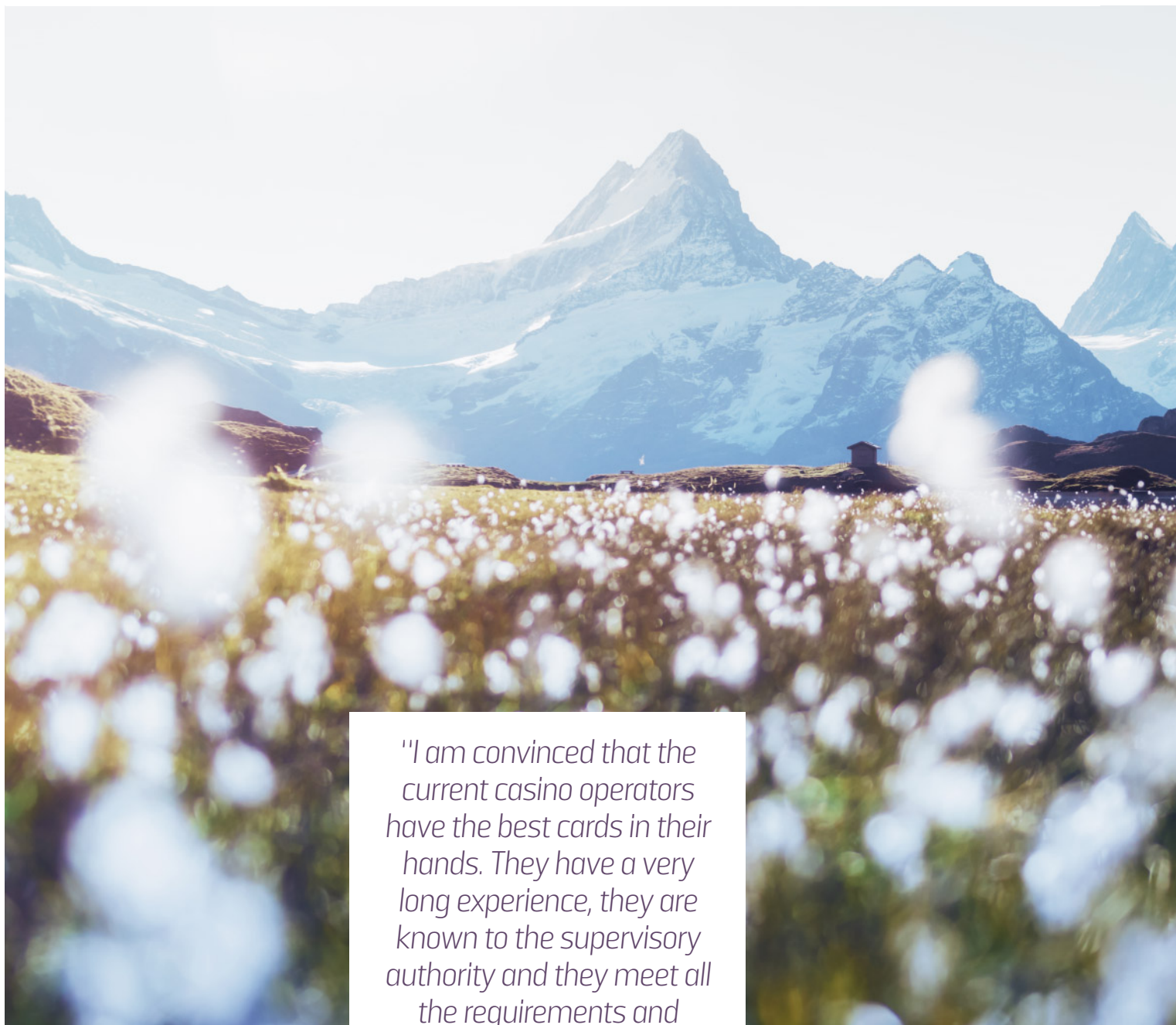


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"I am convinced that the current casino operators have the best cards in their hands. They have a very long experience, they are known to the supervisory authority and they meet all the requirements and conditions required in terms of safety and prevention of gambling addiction. In general, any change is inherent in risks."

Federation said during the association's 2021 annual report: "We would like the confederation to set clear criteria from the outset for the granting procedure and to base its decision making on these criteria.

"In addition, the market must be adequately hedged. This requires at least 21 concessions as at present. When the demand is not sufficiently covered, illegal gambling flourishes and the confederation loses revenue for the AVS. An equally important point is the regional distribution, the law on gambling provides that the distribution of casinos must be balanced between the regions.

"All the current casinos must line up in order to win a concession. And they have competitors because new companies are also hoping to obtain a concession. The Federal Council will

study the application files and decide on the basis of these. However, I am convinced that the current casino operators have the best cards in their hands. They have a very long experience, they are known to the supervisory authority and they meet all the requirements and conditions required in terms of safety and prevention of gambling addiction. In general, any change is inherent in risks. Thus, I do not believe that the confederation wants to risk a decline in receipts for the AVS."

PLAYER PROTECTIONS

One of the main objections to the legislative changes within the casino market was the assumption that it would result in higher gambling addiction issues. So, operators must present a social concept which includes gambling addiction measures and strict security policies.

To obtain a concession extension for online gambling, a casino operator must:

- Present a programme of security measures and a program of social measures.
- Explain the measures they are intending to take to allow for taxation payments.
- Ensure a good reputation and offer a

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SWITZERLAND CASINOS

CASINO ADMIRAL, MENDRISIO

Concession type:	B
Majority shareholder:	Ace Casino Holding
Table games:	26
Slots:	337
Online gaming licence:	–
Website:	casinomendrisio.ch

CASINO DU LAC, MEYRIN

Concession type:	B
Majority shareholder:	Ispar Holding/Partouche
Table games:	17
Slots:	234
Online gaming licence:	April 2020
Start of online gaming:	Nov 2020
Online casino games:	366
Website:	casino-de-geneve.com
Online website:	pasino.ch
Online partner:	Gamanza

CASINO DE MONTREUX

Concession type:	A
Majority shareholder:	Groupe Lucien Barriere
Table games:	24
Slots:	381
Online gaming licence:	Aug 2021
Start of online gaming:	Dec 2021
Online casino games:	80
Website:	casinosbarriere.com
Online website:	gamrfirst.ch
Online partner:	Gamanza

CASINO NEUCHÂTEL

Concession type:	B
Majority shareholder:	Congress & Kursaal Bern
Table games:	5
Slots:	157
Online gaming licence:	Nov 2020
Start of online gaming:	July 2021
Online casino games:	119
Website:	casino-neuchatel.ch
Online website:	hurrahcasino.ch
Online partner:	Gamanza

guarantee of irreproachable commercial activity and independent management.

The social measure programme includes recognising problem gambling and early identification of at-risk gamblers, including collecting player information and the adoption of exclusion measures.

There must be easily accessible information available at each location about the risks of gambling and self checking information and exclusion information. Players must have access to offers of help and treatment and counselling services and self-help group information must be available.

The casino must also collect information relating to the personal, professional, and financial situation of the players.

CRANS ZÜRICHSEE, PFAFFIKON

Concession type:	B
Majority shareholder:	Swiss Casino Holding
Table games:	10
Slots:	181
Online gaming licence:	June 2019
Start of online gaming:	Sept 2019
Online casino games:	449 + Playtech poker
Website:	swisscasinos.ch/pfaeffikon
Online website:	swisscasinos.ch
Online partner:	Playtech

CASINO SCHAFFHAUSEN

Concession type:	B
Majority shareholder:	Swiss Casino Holding
Table games:	8
Slots:	131
Online gaming licence:	–
Website:	swisscasinos.ch/schaffhausen

GRAND CASINO ST.GALLEN

Concession type:	A
Majority shareholder:	Swiss Casino Holding
Table games:	10
Slots:	199
Online gaming licence:	–
Website:	swisscasinos.ch/stgallen

CASINO ST. MORITZ

Concession type:	B
Majority shareholder:	Casinos Austria
Table games:	6
Slots:	65
Online gaming licence:	–
Website:	casinostmoritz.ch

SWISS CASINOS ZÜRICH

Concession type:	A
Majority shareholder:	Swiss Casino Holding
Table games:	14
Slots:	295
Online gaming licence:	–
Website:	swisscasinos.ch/zuerich

Casinos can exclude players or players can exclude themselves and this extends to casino games for both land-based and online sectors. By the end of 2020, the number of exclusions in Switzerland had reached over 72,000. Meanwhile the fight against illegal gambling continues.

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Meanwhile, the fight against illegal gambling continues. It is said the GGR for unauthorised gambling in Switzerland from illegal games in bars and clubs is estimated to be around CHF150m, whilst illegal online gaming GGR is estimated to be more than CHF100m.

The access blocks introduced from July 2019 are proving effective whilst players are gaining familiarity with the Swiss offerings and the knowledge of having the assurance of correct operating procedures.

A study in 2019 by ISGF showed that 69 per cent

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SWISSLOS GGR

YEAR	GGR LOTTERY	GGR INSTANTS	GGR SPORTS BETTING	GGR SKILL GAMES	GGR TOTAL
	€1.23m	€1.12m	1.1%		
2019	CHF382m	CHF170m	CHF42m	CHF1m	CHF595m
2020	CHF378m	CHF174m	CHF66m	CHF2m	CHF620m

LOTERIA ROMANDE GGR

YEAR - GGR	ELECTRONIC LOTTERY	INSTANTS	SPORTS BETTING	PMU	DRAW GAMES	GGR TOTAL
2019	CHF76.1m	CHF121.8m	CHF19.7m	CHF28.7m	CHF161.6m	CHF408m
2020	CHF42.5m	CHF128.8m	CHF25.6m	CHF23.6m	CHF153.5m	CHF374.2m

of the Swiss population over the age of 15 had played a gambling game at least once in their life and 55 per cent within the last 12 months. Lotteries were played the most frequently.

Illegal gambling remains one of the main priorities of the federal law on gambling. There are blocking procedures and a blacklist in place. Chapter seven of the Gaming Act states:

- Access to online gambling offer must be blocked when the offer is not authorised in Switzerland.
- Access is blocked to those foreign operators domiciled in offshore states. Foreign operators can cooperate with Swiss casinos to offer online services, but this cooperation must be approved.
- The CFMJ and canton authorities will keep a list of the blocked gambling sites.
- Swiss telecommunications providers (ISPs) are required to block access for those on the blacklist.
- The CFMJ and canton authorities can authorise a user to access blocked gaming sites for monitoring or research purposes.

The blacklist is published on the CFMJ and the Interkantonale Geldspielaufsicht (canton authority GESPA) website. ISPs can submit a written opposition to the decision-making authority within 30 days of notification. When a game no longer meets 'blocking conditions,' the authority will withdraw it and the blocked website is then removed from the blacklist.

The system initially came into force in July 2019, six months after the LJAr and in September 2019 the CFMJ published its first list of blocked game offers which contained 41 domain names linked to online casinos not authorised in Switzerland. By the end of 2019 there were 110 blocked websites. In 2020, an additional 206 website addresses were added to the blacklist bringing the total by the end of 2020 to over 316 blocked sites.

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Enforcement of the law includes licence withdrawal for casinos plus high fines and custodial sentences for illegal operations.

LOTTERIES AND SPORTS BETTING

Lottery and sports betting remain a state monopoly and are operated via SwissLos and Loterie Romande.

There are said to be around 1.5 million active sports betting players in Switzerland. The games are offered via SwissLos and Loterie Romande, under their brands Sporttip and Joueur Sport via traditional outlets and online.

The lottery and sports betting sector is overseen by the inter-cantonal Lottery and Betting Board (Comlot) which was re-branded last year and is now known as the Swiss Gambling Supervisory Authority (GESPA).

The core task of GESPA is to supervise the lotteries and sports betting section, supervise gambling games, combat illegal activities and to function as a competence centre for gambling.

Operators of large-scale gambling in Switzerland require an operator licence and a game licence from GESPA.

According to GESPA, in 2020 the turnover for the lotteries and sports betting sectors (land-based and online) amounted to CHF2.86bn (five per cent less than 2019) and a GGR of CHF992.8m of which 84 per cent of revenue is generated by lottery products. With a population in the country of 8.6 million, the average amount bet per inhabitant was CHF330.

The share of the online gambling channels in 2020 was 17 per cent compared to 14 per cent in 2019

Sports betting (land-based and online) saw a turnover in 2020 of CHF421.8m and revenues of CHF88.5m. This was the only sector which saw a huge increase from 2019 data with a 58 per cent increase in turnover and 52 per cent in GGR.

Although betting on unlicensed sports betting sites is technically illegal, no actions have been taken against players who bet on them. Players simply access by using a VPN to evade internet blocking measures and the best odds are available via the foreign betting sites.

However, since the new legislation in 2019 the government has been blocking websites of unlicensed providers and many of the bigger-name operators have pulled out of Switzerland in anticipation of partnering with a casino down the road to offer legal online gambling.

SwissLos offers lotteries, sports betting and instant tickets throughout the German speaking territory of Switzerland in Ticino and principality of Liechtenstein.

It offers four number lottery games - Swiss Lottery, EuroMillions, Subito and Bingo - plus sports betting via Sporttip and PMU (horse racing), scratchcards and skill game Jass online.

GGR in 2020 for SwissLos amounted to CHF620m of which CHF66m came from sports

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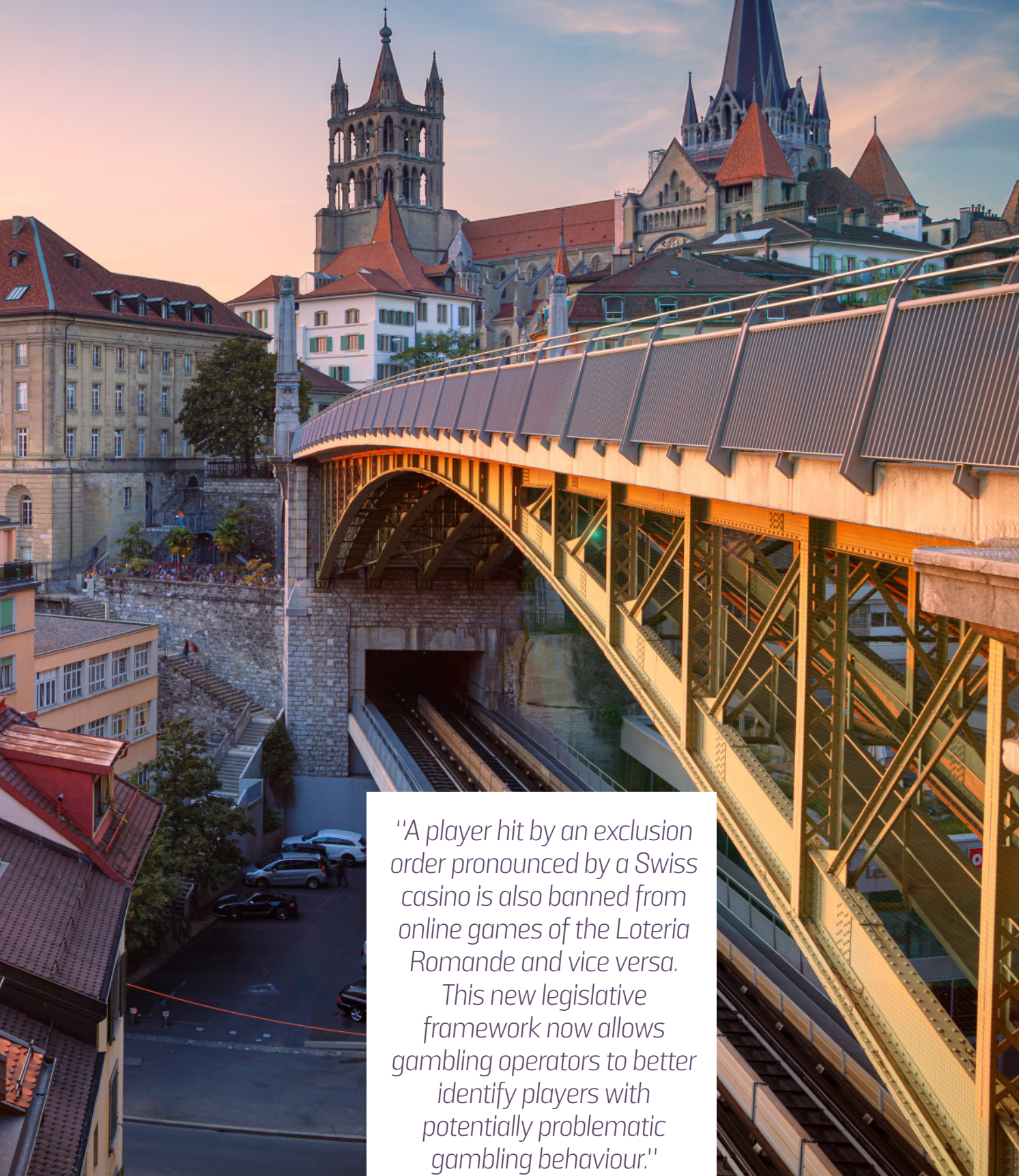
"The main impact of the new legislative framework concerns social measures against the risks of gambling addiction, which have been considerably strengthened to best protect vulnerable populations, in particular on the digital channel."

Jean-Rene Fournier,
President, Loteria Romande



LAND-BASED AND ONLINE GGR 2019-2021

CASINO	LAND-BASED GGR 2019	ONLINE GG2 2019	LAND-BASED GG2 2020	ONLINE GG2 2020	LAND-BASED GGR 2021	ONLINE GGR 2021
A CASINOS	CHF448.9m	CHF15.27m	CHF284.5m	CHF108.4m	CHF246m	CHF122.1m
Baden	CHF65.6m	CHF6.34m	CHF50.7m	CHF38.4m	€39.6m	CHF43.4m
Basel	CHF62.6m	-	CHF36.7m	-	€34.4m	CHF85,434
Bern	CHF47.4m	-	CHF27.6m	CHF1.16m	€27.9m	CHF2.3m
Lugano	CHF58.5m	-	CHF33.3m	-	€28.2m	CHF2m
Lucerne	CHF38.5m	CHF8.93m	CHF24.8m	CHF68.9m	€18.5m	CHF74.3m
Montreux	CHF66m	-	CHF37.7m	-	€35.5m	CHF26,276
St Gallen	CHF31.8m	-	CHF23m	-	€18.7m	-
Zurich	CHF78.2m	-	CHF50.4m	-	CHF43.2m	-
B CASINOS	CHF293.4m	€8.21m	CHF167.3m	CHF78m	CHF159.7m	CHF112.2m
Bad Ragaz	CHF15.9m	-	CHF9.4m	-	€9.4m	-
Courrendin	CHF13.6m	-	CHF7.68m	-	€7.6m	-
Crans Montana	CHF14.6m	-	CHF8.33m	-	€7m	-
Davos	CHF2m	CHF1.34m	CHF1.2m	CHF16.7m	€0.7m	CHF26.5m
Granges-Paccot	CHF18.8m	-	CHF10.8m	-	€9.5m	-
Interlaken	CHF10.6m	-	CHF5.6m	CHF14.1m	€5.4m	CHF13.7m
Locarno	CHF18.9m	-	CHF13.1m	-	€11.5m	-
Mendrisio	CHF70.3m	-	CHF36.7m	-	€40.4m	-
Meyrin	CHF57.4m	-	CHF27.1m	CHF317,930	€29.2m	CHF6.9m
Neuchatel	CHF24.6m	-	CHF15m	-	€12.9m	CHF1.4m
Pfaffikon	CHF30.4m	CHF6.87m	CHF21.4m	CHF46.9m	€16.8m	CHF63.7m
Schaffhausen	CHF12.9m	-	CHF8.7m	-	€8.5m	-
St Moritz	CHF2.8m	-	CHF1.72m	-	€0.8m	-
TOTAL A+B	CHF742.4m	CHF23.49m	CHF451.9m	CHF186.8m	CHF405.6m	CHF234.4m



"A player hit by an exclusion order pronounced by a Swiss casino is also banned from online games of the Loteria Romande and vice versa. This new legislative framework now allows gambling operators to better identify players with potentially problematic gambling behaviour."

betting. This was compared to CHF595m in 2019 (total GGR) and CHF42m from sports betting.

SwissLos turnover was CHF1.59bn in 2020 – just over 10 per cent more than 2019. This growth was attributed to the higher market share due to the new Gambling Act which saw many unlicensed gambling sites blocked.

Meanwhile, Loteria Romande offers lottery and sports betting in the six French speaking cantons in Switzerland – Vaud, Freiburg, Valais, Neuchatel, Geneva and Jura.

The company offers six number games – Swiss

Loto, EuroMillions, Magic 3, Magic 4, Loto Express and Banco – plus sports betting and horse race betting (PMU) via Jouez Sport and nearly 40 scratchcards.

Loteria Romande saw CHF374m in GGR in 2020 compared to CHF408 in 2019. The decrease was mostly due to the closure of part of its distribution network via the bars and cafes during Covid restrictions even though its Points of Sale remained open.

President of Loteria Romande, Jean-Rene Fournier, said in the company annual report: "The main impact of the new legislative

framework concerns social measures against the risks of gambling addiction, which have been considerably strengthened to best protect vulnerable populations, in particular on the digital channel.

"For example, thanks to a common register, a player hit by an exclusion order pronounced by a Swiss casino is also banned from online games of the Loteria Romande and vice versa. This new legislative framework now allows gambling operators to better identify players with potentially problematic gambling behaviour in order to refer them to specialised care centres if necessary."