

WORLD COUNT OF GAMING
MACHINES 2008

A MARKETING RESEARCH REPORT

Prepared For:

AGMMA

Client Contact:

Ross Ferrar

TNS Consultant:

Jo Farquhar

J26559

March, 2009

TNS

48 Pyrmont Bridge Road
Pyrmont NSW 2009

t +61 2 9563 4200

f +61 2 9563 4202

e sydney.au@tns-global.com

TNS is a trade mark of Taylor Nelson Sofres Plc



Table of contents

	Page
1. Introduction	1
2. Study overview	2
2.1 Definition of gaming and gaming machines	2
2.2 Study method	4
3. Study limitations	6
4. Executive summary	7
5. Main findings	8
5.1 The worldwide installed base of gaming machines	8
5.2 Installed base by machine category	9
5.3 Comparing gaming machine counts by country	10
5.4 Number of people per gaming machine	12
Appendix	13
Data for individual countries	13
Asia-Pacific	13
Australia	16
North America (including State/Province breakdowns)	17
Central and South America	21
Europe and Middle East	24
Africa	27
Asia Pacific - change over time	30
North, Central and South America - change over time	32
Europe and Middle East - change over time	34
Africa - change over time	36



1. Introduction

Australian gaming companies continue to operate on a global scale as some of the most successful and respected in the industry.

The Australian Gaming Machine Manufacturer's Association (AGMMA) represents the interests of local gaming machine manufacturers.

To remain at the forefront of gaming market knowledge, AGMMA recognise the need to obtain reliable estimates of the installed base of gaming machines on a worldwide basis. This allows for comparison of the Australian installed base to that of other countries where gaming machines exist.

AGMMA has commissioned TNS to conduct an independent audit of the world installed base of gaming machines on four previous occasions. These studies were conducted in 1999, 2002, 2004 and 2006.

AGMMA recently commissioned TNS to conduct a further audit of the world installed base of gaming machines to update the numbers for 2008.

AGMMA intend communicating the results of this latest audit to a range of industry and government stakeholders. As owners of the "World Count of Gaming Machines 2008", AGMMA are at liberty to communicate the results from this latest audit to interested parties as they see fit.

This report outlines the findings from the TNS 2008 audit of gaming machines.

In short, this report provides an estimate of the actual number of gaming machines installed worldwide.



2. Study overview

Overall, the key purpose of this study is to produce a reliable point-in-time estimate of the worldwide installed base of gaming machines.

This section provides details of the methods used to obtain figures on installed gaming machines around the world along, with the definitions used.

2.1 Definition of gaming and gaming machines

In the context of gambling, with our focus being gaming machines, the following definition of a gaming machine was used as our benchmark:

“Any machine that is used for gaming purposes (whether mechanical or electronic) and offers the user a potential return on a single ‘game’ that is greater than the amount risked on that game.”

A distinction was drawn between machines used for the purposes of gaming and those for wagering.

However, it should also be noted that this definition of gaming machines covers more machine types than the traditional ‘poker machine’ commonly found in Australian casinos, pubs, hotels and clubs.

Instead, our approach has been to count all machines that are of the same nature as ‘slot machines’ with the common criteria that the machines meet the gaming definition as described above. Counts have been separated for the various types of machines to allow for easy comparison.

Following are the categories of machine included in our investigation.



Slot - Casino style

This category includes both stepper slot and video slot machines. Australia's traditional poker machines belong to this category.

Video Lottery Terminal (VLT)

Video lottery terminals usually refer to dedicated multi-game video slot machines that are connected to a wide area network in the North American markets.

Pachinko/Pachislo

These are gaming machines commonly found in Japan with the former commonly referred to as a ball bearing game and the latter a token-in/token-out game.

Where TNS have not been able to determine the specific machine type (usually due to lack of separated figures at the source), we have classified these as slot machines, as the emerging generic term used for gaming machines.

It must also be noted that our classification of gaming machines has been largely dependent on the use and understanding of terminology and definitions at the source, i.e. TNS have not re-classified machines according to our own understanding of the machines but rather have been led by the source in defining the machine types. Naturally, clarification of type was sought in each case, to reduce ambiguity.



2.2 Study method

Given the nature of the information required and the various ways in which the information is held around the world, a variety of techniques were employed to collect data. A summary of our methods follows.

The initial goal in each country was to identify primary data direct from the owners/purchasers of the machines. The secondary data source was information from the government or regulatory body responsible for monitoring and/or regulating gambling in that country, followed by independent research and gaming sources. A brief description of each data source follows:

- **Primary** - data collected from the owners of gaming machine facilities in each country. In countries with a high volume of “standalone” machines located in wide reaching locations, TNS have deferred to government figures.
- **Government** - figures from the governmental or regulatory body responsible for the regulation of gaming in the country under review.
- **Gaming sources** - Information from gaming sources includes market research published by various gaming machine manufacturers or gaming industry bodies in the countries or regions studied.
- **Independent research** - includes reports published by government bodies or industry groups which have been collected by another marketing information group or body.

Where primary source data and/or government sources did not exist or were not obtainable, we sourced machine counts from independent bodies. In some cases this involved bodies that had collected the data themselves and in others a third party was used to obtain data.

In all cases TNS attempted to locate and verify the source responsible for collecting the data.



In some cases data was available from a variety of sources. When this happened we deferred in each case to the most authoritative source based on available knowledge. Primary source information was given preference over government or regulatory bodies which were in turn given precedence over other data. The reasoning behind this process was that primary data was considered to be most recent (and a more accurate reflection of installed machines), followed by government data which tends to be updated annually or less often.

Once estimates for a country were obtained, the next step was to obtain written confirmation of the figures from the most authoritative source. Accumulated gaming machine counts shown in this report are based on counts that TNS believe are verifiable in the sense that they are considered to be from reliable sources. When any doubt existed as to the reliability of the source, counts have not been included in the accumulated figures.



3. Study limitations

As noted in the previous section of this report, the estimates provided are based on judgement regarding the validity of the sources of the data supplied. While TNS have been strict regarding our definition of validity, we cannot guarantee that our estimates are 'number perfect'.

Overall, the largest area not fully represented in this report is illegal gaming machines. Anecdotal evidence from some Asian countries suggests that relatively large numbers of illegal gaming machines may exist in countries such as China.

TNS have supplied estimates for illegal machines where we were able to obtain these. Counts of illegal machines have been clearly noted.

This means that percentages of market share for the better legislated countries (such as Australia) may well be below the *actual* market share if illegal machines were taken into account.



4. Executive summary

TNS estimate the total worldwide installed base of gaming machines is 7,678,528 machines.

The largest number of gaming machines is found in Japan with 4,900,000 machines, which equates to one machine for every 26 people.

The United States has the largest number of gaming machines outside of Japan whilst Europe heavily dominates the minor placings. Contrary to popular belief in Australia, the Australian population of gaming machines ranks eighth overall.

As a proportion of the world installed base, Australia has 2.4% of the world's gaming machines.

It should be noted that whilst European countries such as Italy, Spain, United Kingdom and Germany have particularly high counts of machines, many of these machines are what would be considered to be 'street style' gaming machines - gaming machines which include amusement games with payouts and limited payment machines designed more for 'amusement' and entertainment rather than for the purpose of gaming.

5. Main findings

5.1 The worldwide installed base of gaming machines

Based on the verifiable data collected in December 2007 / January 2008, TNS estimate the worldwide installed base of gaming machines is 7,678,528.

This is a decrease of 302,570 from the 2006 installed base. There have been decreases across a number of countries, notably Italy, the United Kingdom, Norway and Portugal. Anecdotal information indicates that legal uncertainty in Italy has resulted in a temporary but significant reduction in the number of operational gaming machines. This appears likely to be resolved in due course, at which time the count should return to previous levels. The decline in Norway is due to a new government monopoly and the reduction in Portugal is due to changes in the law as well as a struggling industry. The decline in the United Kingdom may be due to the inclusion of pinball and claw-grab machines in the 2006 figures.

Please note that the actual total will be larger than the above figure given the existence of unregistered and illegal machines, of which not all numbers could be verified.

Table 1 shows the total installed base by region for 2004, 2006 and 2008.

Table 1: Total installed base by region; 2004, 2006 and 2008

Region	Number of Machines 2004	Percentage of Total 2004	Number of Machines 2006	Percentage of Total 2006	Number of Machines 2008	Percentage of Total 2008
Asia Pacific	5,068,037	66.6%	5,164,121	64.7%	5,143,493	67.0%
North America	770,358	10.1%	825,991	10.3%	908,587	11.8%
South America	73,162	0.96%	108,889	1.4%	61,255	0.8%
Europe	1,683,254	22.1%	1,848,595	23.2%	1,536,250	20.0%
Africa	25,447	0.33%	33,503	0.4%	28,943	0.4%
Total	7,620,258	100%	7,981,099	100%	7,678,528	100%

The above counts do not include machines in China despite anecdotal evidence that installed gaming machines exist in these countries.

5.2 Installed base by machine category

The largest category of gaming machine in terms of actual numbers, is the Pachinko/ Pachislo category found predominantly in Japan with 4,900,000 of the world's gaming machines falling in this category.

This year the number of Pachinko/ Pachislo machines was maintained and we see the number of slot machines declining to levels seen prior to 2006. The number of VLT machines is up slightly from 2006, but still only accounting for 1% of total.

Counts for all categories investigated appear in the table 2.

Table 2: Total installed base by category; 2002, 2004, 2006 and 2008

Machine categories	Number of machines 2002	Percentage of total 2002	Number of machines 2004	Percentage of total 2004	Number of machines 2006	Percentage of total 2006	Number of machines 2008	Percentage of total 2008
Pachinko/Pachislo	5,100,000	65.7%	4,823,227	63.29%	4,900,000	62%	4,900,000	64%
Slot - Casino style	2,545,325	32.7%	2,663,971	34.96%	2,983,831	37%	2,667,147	35%
VLT	115,726	1.4%	133,060	1.75%	97,268	1%	111,381	1%
Total	7,761,051	100%	7,620,258	100%	7,981,099	100%	7,678,528	100%

The predominant type of gaming machine in operation varies considerably across each region. Table 3 shows the number of machines of each type to be found in each of the five continents studied.

Table 3: Number of machines by category and region

	Asia-Pacific	North America	South America	Europe	Africa
Pachinko/Pachislo	4,900,000				
VLT		93,483	340	17,558	
Slot - Casino style	243,493	815,104	60,915	1,518,692	28,943

5.3 Gaming machine counts by country

The number of gaming machines in each country can be compared in a range of ways. The tables in this section of the report show the countries with most machines in each of the gaming machine categories studied.

Table 4 shows the top ten countries in terms of the total number of any type of gaming machine.

Table 4: Number of machines by country (top 10); by year

COUNTRY	Number of machines 2008	Top 10 2006	Top 10 2004	Top 10 2002	Top 20 1999
Japan	4,900,000	Japan	Japan	Japan	Japan
USA	816,682	USA	USA	USA	USA
Russia	360,000	Italy	Italy	Italy	Italy
Spain	245,966	United Kingdom	United Kingdom	United Kingdom	United Kingdom
United Kingdom	216,626	Russia	Spain	Spain	Spain
Germany	200,000	Spain	Germany	Germany	Germany
Italy	200,000	Germany	Australia	Australia	Australia
Australia	186,344	Australia	Russia	Canada	South Africa
Canada	91,905	Canada	Canada	France	Canada
Czech Republic	59,018	Ukraine	France	Netherlands	France

Table 5 shows the top ten countries in terms of the number of casino style gaming machines (most like 'traditional' poker machines).

Table 5: Number of casino style machines by country

COUNTRY	Number of casino style machines
United States	759,553
Russia	360,000
Spain	245,966
United Kingdom	216,626
Germany	200,000
Italy	200,000
Australia	186,344
Czech Republic	56,218
Canada	55,551
Hungary	30,693

Table 6 shows the countries for which VLT type machines were reported.

Table 6: Number of VLT machines by country

COUNTRY	Number of VLT type Machines
United States	57,129
Canada	36,354
Sweden	7,000
Belgium	6800
Czech Republic	2,800
Iceland	600
Austria	358
Puerto Rico	206
Mexico	134

It can be seen that Australia has a relatively large proportion of casino style gaming machines. However, when viewed as a proportion of the total installed base of gaming machines worldwide, Australia accounts for only 2.4% of the total – a similar proportion to in the last report two years ago.

5.4 Number of people per gaming machine

To ensure a point of reference, population counts for each of the countries investigated were also collected.

Table 7 shows the smallest ten ratios of persons per machine.

Table 7: Number of persons per machine (bottom 10)

COUNTRY	Persons Per Gaming Machine
Monaco	16
Japan	26
Aruba	30
Macau	31
Netherlands Antilles	43
Saint Kitts and Nevis	46
Antigua & Barbuda	90
Australia	110
Latvia	133
Bahamas	160



Appendix

Data for individual countries

- This section includes details of the data collected for each country, along with the source used to verify the data.
- Counts by region within Australia, Canada and the USA have also been provided.
- For ease of cross referencing to other tables in this report, individual countries have been classified into continents.

Asia-Pacific

Country	World market share	People per machine	Total	Casino style	VLT	Pachinko/Pachislo	Source	Population ,000's
American Samoa	0.00%	0	0					57
Australia	2.43%	110	186,344	186,344			Government	20,434
Bangladesh	0.00%	0	0					150,448
Bhutan	0.00%	0	0					2,327
Burma	0.00%	161,683	293	293			Primary	47,373
Cambodia	0.05%	3,499	4,000	4000			Primary	13,995
China*	0.00%	0	0					1,321,851
Christmas Island	0.00%	0	0					1
Cocos Islands	0.00%	0	0					0.5
Cook Islands	0.00%	0	0					21
Fiji	0.00%	0	0					918
French Polynesia	0.00%	0	0					278
Guam	0.00%	0	0					173
Hong Kong	0.00%	0	0	0				6,980
India	0.00%	4,747,336	238	238			Primary	1,129,866
Indonesia	0.00%	0	0					234,693
Japan	63.81%	26	4900000			4,900,000	Gaming	127,433
Kiribati	0.00%	0	0					107
Korea North	0.00%	448,096	52	52			Primary	23,301
Korea South	0.02%	30,943	1,585	1585			Primary	49,044
Laos	0.00%	43,473	150	150			Primary	6,521



Asia-Pacific (cont.)

Country	World market share	People per machine	Total	Casino style	VLT	Pachinko/Pachislo	Source	Population ,000's
Macau	0.19%	31	14,507	14507			Primary	456
Malaysia	0.04%	8,274	3,000	3000			Primary	24,821
Maldives	0.00%	0	0					369
Marshall Islands	0.00%	0	0					61
Micronesia, Federated States of	0.00%	0	0					107
Mongolia	0.00%	0	0					2,951
Nauru	0.00%	0	0					13
Nepal	0.01%	66,135	437	437			Primary	28,901
New Caledonia	0.00%	658	336	336			Primary	221
New Zealand	0.30%	178	23,089	23,089			Government	4,115
Niue	0.00%	0	0					1
Norfolk Island	0.00%	0	0					2
Northern Mariana Islands	0.00%	336	250	250			Primary	84
Pakistan	0.00%	0	0					164,741
Palau	0.00%	0	0					20
Papua New Guinea	0.00%	0	0					5,795
Philippines	0.09%	13,793	6,603	6,603			Primary	91,077
Samoa	0.00%	0	0					214
Singapore	0.03%	2,277	2,000	2,000			Primary	4,553
Solomon Islands	0.00%	5,145	110	110			Primary	566
Sri Lanka	0.00%	0	0					20,926
Taiwan	0.00%	0	0					22,858
Thailand	0.00%	0	0					65,068
Timor-Leste	0.00%	0	0					1,084
Tokelau	0.00%	0	0					1
Tonga	0.00%	0	0					116
Tuvalu	0.00%	0	0					11
Vanuatu	0.00%	1,636	129	129			Primary	211
Vietnam	0.00%	230,438	370	370				85,262



Asia-Pacific (cont.)

Country	World market share	People per machine	Total	Casino style	VLT	Pachinko/Pachislo	Source	Population ,000's
Wallis and Futuna	0.00%	0	0					16

*Our sources claim that no legal gaming machines exist in China despite anecdotal evidence of illegal gaming machines in the region.



Australia

State	Casino style	VLT	Pachinko/ Pachislo	Non classifiable/ specialist	Total	Source
New South Wales/ ACT	97,259				97,259	Government
Victoria	27,279				27,279	Government
Queensland	41,671				41,671	Government
Western Australia	1,750				1,750	Government
South Australia	12,669				12,669	Government
Tasmania	3,667				3,667	Government
Northern Territory	1,997				1,997	Government



North America (including state/province breakdowns)

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Bermuda	0.00%	0	0					66
Saint Pierre and the Miquelon	0.00%	0	0					7
Canada	1.20%	363	91,905	55,551	36,354			33,390
Alberta			17,616	11,616	6,000		Government	
British Columbia			7,179	7,143	36		Primary	
Manitoba			8,468	2,888	5,580		Primary	
Ontario			23,903	23,903	0		Primary	
Quebec			18,732	5,953	12,779		Primary / Government	
Saskatchewan			6,604	2,675	3,929		Primary / Government	
Yukon			64	64	0		Primary	
NWT			0	0	0			
Nunavut			0	0	0			
New Brunswick			8,030	0	8,030		Government	
Newfoundland			0	0			Government	
Nova Scotia			1,099	1,099			Primary	
Prince Edward Island			210	210			Primary	
United States	10.64%	369	816,682	759,553	57,129		Primary/Gov	301,139
Alabama			8,184	3,834	4,350		Primary	
Alaska			40		40		Primary	
Arizona			13,195	13,195			Primary	
Arkansas			1,200	1,200			Primary	
California			65,357	63,126	2,231		Primary	
Colorado			20,161	20,161			Primary	
Connecticut			13,697	13,697			Primary	
Delaware			7,559	555	7,004		Primary / Government	



North America (cont.)

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Florida			29,804	28,293	1,511		Primary	
Georgia			443	443			Primary	
Idaho			3,975	3,975			Primary	
Illinois			13,863	13,863			Primary	
Indiana			18,706	18,706			Primary	
Iowa			20,655	20,655			Primary	
Kansas			3,211	3,151	60		Primary	
Louisiana			29,149	29,107	42		Primary	
Maine			675	675			Primary	
Maryland			0	0			Primary	
Massachusetts			225	225			Primary	
Michigan			27,740	27,701	39		Primary	
Minnesota			21,797	21,694	103		Primary	
Mississippi			41,075	41,075			Primary	
Missouri			17,976	17,976			Primary	
Montana			16,907	15,532	1,375		Primary / Government	
Nebraska			314	220	94		Primary	
Nevada			202,362	202,362			Government	
New Hampshire			0	0			Primary	
New Jersey			37,412	37,412			Government	
New Mexico			15,983	15,983			Primary	
New York			24,398	19,899	4,499		Primary	
North Carolina			3,402	3,402			Primary	
North Dakota			3,414	3,414			Primary	
Ohio			0	0			Primary	
Oklahoma			45,746	45,746			Primary	
Oregon			19,802	7964	11,838		Primary / Government	



North America (cont.)

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Pennsylvania			12,445	12,445			Primary	
Rhode Island			5,822		5,822		Primary	
South Carolina			655	655	0		Primary	
South Dakota			5,984	5,911	73		Primary	
Texas			1,775	1,775			Primary	
Washington			22,442	15,767	6,675		Primary	
West Virginia			22,021	10,700	11,321		Primary / Government	
Wisconsin			16,373	16,373			Primary	
Wyoming			738	686	52		Primary	



Central and South America

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Anguilla	0.00%	0	0					13
Antigua and Barbuda	0.01%	90	765	765			Primary	69
Argentina	0.20%	2,694	14,959	14,959			Primary	40,301
Aruba	0.04%	30	3,291	3,291			Primary	100
Bahamas	0.02%	160	1,901	1,901			Primary	305
Barbados	0.00%	11,200	25	25			Primary	280
Belize	0.01%	354	830	830			Primary	294
Bolivia	0.00%	0	0					9,119
Brazil	0.00%	0	0					190,010
British Virgin Islands	0.00%	0	0					23
Cayman Islands	0.00%	0	0					46
Chile	0.05%	4,510	3,611	3,611			Primary	16,284
Colombia	0.02%	24,918	1,781	1,781			Primary	44,379
Costa Rica	0.02%	2,710	1,525	1,525			Primary	4,133
Cuba	0.00%	0	0					11,394
Dominica	0.00%	0	0					72
Dominican Republic	0.02%	6,836	1,370	1,370			Primary	9,365
Ecuador	0.01%	13,894	990	990			Primary	13,755
El Salvador	0.00%	69,480	100	100			Primary	6,948
Falkland Islands	0.00%	0	0					3
Guatemala	0.00%	66,989	190	190				12,728
Grenada	0.00%	0	0					89
Guyana	0.00%	0	0					769
Haiti	0.00%	108,825	80	80			Primary	8,706
Honduras	0.00%	136,055	55	55			Primary	7,483
Jamaica	0.01%	3,445	807	807			Primary	2,780
Mexico	0.00%	811,194	134		134			108,700
Montserrat	0.00%	0	0					9
Netherlands	0.07%	43	5,161	5,161			Primary	223



Central and South America (cont.)

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Antilles								
Nicaragua	0.01%	8,273	686	686			Primary	5,675
Panama	0.04%	943	3,438	3,438			Primary	3,242
Paraguay	0.00%	39,696	168	168			Primary	6,669
Peru	0.11%	3,443	8,327	8,327			Primary	28,674
Puerto Rico	0.07%	779	5,062	4,856	206		Primary	3,944
Saint Barthelemy	0.00%	0	0					6
Saint Helena	0.00%	0	0					7
Saint Lucia	0.00%	515	330	330			Independent Research	170
Saint Martin	0.00%	0	0					33
Saint Kitts and Nevis	0.01%	46	853	853			Primary	39
Saint Vincent and the Grenadines	0.00%	1,475	80	80			Primary	118
Suriname	0.01%	625	752	752			Primary	470
Turks and Caicos Isles	0.00%	171	123	123				21
Trinidad and Tobago	0.00%	5,254	201	201				1,056
Uruguay	0.03%	1,316	2,630	2,630			Primary	3,460
Venezuela	0.01%	38,840	670	670			Primary	26,023
Virgin Islands	0.00%	300	360	360				108



Europe and Middle East

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Afghanistan	0.00%	0	0					31,889
Albania	0.00%	15,000	240	240			Primary	3,600
Andorra	0.00%	0	0					71
Armenia	0.00%	33,011	90	90			Primary	2,971
Austria	0.03%	3,580	2,290	1,932	358		Primary	8,199
Azerbaijan	0.00%	0	0					8,120
Belarus	0.00%	30,483	319	319			Primary	9,724
Belgium	0.43%	317	32,784	25,984	6,800		Primary/Ind Research	10,392
Bahrain	0.00%	0	0					708
Bosnia and Herzegovina	0.00%	39,241	116	116			Primary	4,552
Brunei	0.00%	0	0					374
Bulgaria	0.20%	488	15,000	15,000			Primary	7,322
Croatia	0.02%	2,824	1,591	1,591			Primary	4,493
Cyprus	0.03%	323	2,440	2,440			Primary	788
Czech Republic	0.77%	173	59,018	56,218	2,800		Government	10,228
Denmark	0.32%	223	24,500	24,500			Primary	5,468
Estonia	0.05%	369	3,568	3,568			Primary	1,315
Faroe Islands	0.00%	0	0					47
Finland	0.23%	291	18,000	18,000			Gaming	5,238
France	0.24%	3,408	18,695	18,695			Primary	63,713
Georgia	0.00%	21,118	220	220			Primary	4,646
Germany	2.60%	412	200,000	200,000			Primary	82,400
Gibraltar	0.00%	93	290	290			Primary	27
Greece	0.03%	4,220	2,537	2,537			Primary	10,706
Greenland	0.00%	0	0					56
Guernsey	0.00%	0	0					65
Hungary	0.40%	324	30,693	30,693			Government	9,956
Iceland	0.01%	280	1,075	475	600		Primary	301
Iran	0.00%	0	0					65,397
Iraq	0.00%	0	0					27,499



Europe and Middle East (cont.)

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Ireland	0.12%	449	9,159	9,159			Primary	4,109
Israel	0.00%	102,000	63	63			Primary	6,426
Italy	2.60%	291	200,000	200,000			Primary	58,147
Jordan	0.00%	0	0					6,053
Kuwait	0.00%	0	0					2,505
Kazakhstan	0.00%	80,442	190	190				15,284
Kyrgyzstan	0.00%	203,231	26	26			Primary	5,284
Latvia	0.22%	133	16,974	16,974			Government	2,259
Lebanon	0.01%	9,887	397	397			Primary	3,925
Liechtenstein	0.00%	0	0					34
Lithuania	0.01%	6,305	567	567				3,575
Luxembourg	0.00%	1,639	280	280			Primary	459
Macedonia	0.00%	11,610	177	177			Primary	2,055
Malta	0.00%	0	0					401
Man. Isle of	0.00%	417	180	180			Primary	75
Moldova	0.00%	0	0				Primary	4,320
Monaco	0.03%	16	2,028	2,028			Primary	32
Montenegro	0.00%	0	0					684
Netherlands	0.11%	1,995	8,306	8,306			Primary	16,570
Norway	0.24%	250	18,500	18,500			Independent Research	4,627
Oman	0.00%	0	0					3,204
Poland	0.25%	2,036	18,917	18,917			Primary	38,518
Portugal	0.08%	1,774	6,000	6,000			Primary	10,642
Qatar	0.00%	0	0				Primary	907
Romania	0.01%	25,429	876	876			Primary	22,276
Russia	4.69%	393	360,000	360,000			Primary	141,377
San Marino	0.00%	0	0					29
Saudi Arabia	0.00%	0	0					27,601
Serbia	0.01%	13,063	777	777				10,150
Slovakia	0.00%	39,471	138	138			Primary	5,447
Slovenia	0.06%	460	4,369	4,369			Primary	2,009



Europe and Middle East (cont.)

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Spain	3.20%	164	245,966	245,966			Primary	40,448
Svalbard	0.00%	0	0					2
Sweden	0.10%	1,149	7,862	862	7,000		Independent Research	9,031
Switzerland	0.04%	2,203	3,429	3,429			Government	7,554
Tajikistan	0.00%	0	0					7,076
Turkey	0.00%	0	0					71,158
Turkmenistan	0.00%	30,891	165	165			Primary	5,097
Ukraine	0.01%	57,018	812	812			Primary	46,299
United Arab Emirates	0.00%	0	0					4,444
United Kingdom	2.82%	281	216,626	216,626			Primary	60,776
Uzbekistan	0.00%	0	0					27,780
Vatican City	0.00%	0	0					1
Yemen	0.00%	0	0	0				22,230



Africa

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Algeria	0.00%	0	0					33,333
Angola	0.00%	0	0					12,263
Benin	0.00%	807,800	10	10				8,078
Botswana	0.01%	3,119	582	582			Primary	1,815
Burkina Faso	0.00%	0	0					14,326
Burundi	0.00%	0	0					8,390
Cameroon	0.00%	155,690	116	116			Primary	18,060
Cape Verde	0.00%	0	0					423
Central African Republic	0.00%	0	0					4,369
Chad	0.00%	0	0					9,885
Comoros	0.00%	25,393	28	28			Primary	711
Congo (DRC)	0.00%	657,510	100	100			Primary	65,751
Congo	0.00%	0	0					3,800
Cote d'Ivoire	0.00%	0	0					18,013
Djibouti	0.00%	12,400	40	40			Primary	496
Egypt	0.01%	124,550	645	645			Primary	80,335
Equatorial Guinea	0.00%	4,051	136	136				551
Eritrea	0.00%	0	0					4,906
Ethiopia	0.00%	0	0					76,511
Gabon	0.00%	0	0					1,454
Gambia	0.00%	0	0					1,688
Ghana	0.00%	229,310	100	100			Primary	22,931
Guinea	0.00%	0	0					9,947
Guinea-Bissau	0.00%	0	0					1,472
Kenya	0.01%	51,268	720	720			Primary	36,913
Lesotho	0.00%	15,071	141	141			Primary	2,125
Liberia	0.00%	99,844	32	32				3,195
Libya	0.00%	0	0					6,036
Madagascar	0.00%	67,062	290	290			Primary	19,448
Mali	0.00%	0	0					11,995



Africa (cont.)

Country/ State/ Province	World market share	People per machine	Total	Casino style	VLT	Pachinko/ Pachislo	Source	Population ,000's
Malawi	0.00%	93,171	146	146				13,603
Mauritania	0.00%	0	0					3,270
Mauritius	0.01%	2,013	621	621			Primary	1,250
Mayotte	0.00%	0	0					208
Morocco	0.01%	46,561	725	725			Primary	33,757
Mozambique	0.00%	114,863	182	182			Primary	20,905
Namibia	0.01%	3,960	519	519			Primary	2,055
Niger	0.00%	0	0					12,894
Nigeria	0.00%	3,375,775	40	40			Primary	135,031
Reunion	0.00%	3,090	256	256			Primary	791
Rwanda	0.00%	0	0					9,907
Sao Tome and Principe	0.00%	0	0					199
Senegal	0.00%	35,774	350	350			Primary	12,521
Seychelles	0.00%	653	124	124			Primary	81
Sierra Leone	0.00%	0	0					6,144
Somalia	0.00%	0	0					9,118
South Africa	0.28%	2,075	21206	21206			Primary	43,997
Swaziland	0.00%	4,135	274	274			Primary	1,133
Syria	0.00%	0	0					19,314
Sudan	0.00%	0	0					39,379
Tanzania	0.01%	99,959	394	394			Primary	39,384
Togo	0.00%	0	0					5,701
Tunisia	0.01%	24,411	419	419			Primary	10,228
Uganda	0.00%	145,838	210	210			Primary	30,626
Western Sahara	0.00%	0	0	0				382
Zambia	0.00%	68,545	167	167			Primary	11,447
Zimbabwe	0.00%	33,273	370	370			Primary	12,311

Asia-Pacific - Change to numbers over time

COUNTRY	World share 2004	Total machines 2004	World share 2006	Total machines 2006	World share 2008	Total machines 2008	% Change 2006-2008
American Samoa	0.00%	0	0.00%	0	0.00%	0	=
Australia	2.6%	198,751	2.35%	186,468	2.43%	186,344	<-0.5%
Bangladesh	-	-	-	-	0.00%	0	-
Bhutan	-	-	-	-	0.00%	0	-
Burma	0.00%	0	0.00%	176	0.00%	293	66%
Cambodia	0.02%	1,546	0.02%	1,662	0.05%	4,000	141%
China	0.00%	0	0.00%	0	0.00%	0	=
Christmas Island	0.00%	41	0%	0	0.00%	0	=
Cocos Islands	-	-	-	-	0.00%	0	-
Cook Islands	0.00%	0	0.00%	0	0.00%	0	=
Fiji	0.00%	0	0.00%	0	0.00%	0	=
French Polynesia	-	-	-	-	0.00%	0	-
Guam	-	-	-	-	0.00%	0	-
Hong Kong	0.08%	6,420	0.08%	6,420	0.00%	0	-100%
India	0.00%	256	0%	256	0.00%	238	-7%
Indonesia	0.00%	0	0.00%	0	0.00%	0	=
Laos	0.00%	150	0%	150	0.00%	150	0%
Japan	63.2%	4,823,227	61.81%	4,900,000	63.81%	4,900,000	0%
Kiribati	-	-	-	-	0.00%	0	-
Korea North	0.00%	0	0.00%	52	0.00%	52	=
Korea South	0.02%	1,375	0.02%	1,373	0.02%	1,585	15%
Macau	0.02%	1,213	0.05%	4,223	0.19%	14,507	244%
Malaysia	0.04%	3,140	0.04%	3,140	0.04%	3,000	-4%
Maldives	-	-	-	-	0.00%	0	-
Marshall Islands	0.00%	0	0.00%	0	0.00%	0	=
Micronesia, Federated States of	-	-	-	-	0.00%	0	-
Mongolia	0.00%	0	0.00%	0	0.00%	0	=
Nauru	0.00%	0	0.00%	0	0.00%	0	=
Nepal	0.00%	292	0%	321	0.01%	437	36%
New Caledonia	0.00%	336	0%	336	0.00%	336	0%

Asia-Pacific - Change to numbers over time (cont.)

COUNTRY	World share 2004	Total machines 2004	World share 2006	Total machines 2006	World share 2008	Total machines 2008	% Change 2006-2008
New Zealand	0.30%	22,646	0.27%	21,343	0.30%	23,089	8%
Niue	-	-	-	-	0.00%	0	-
Norfolk Island	0.00%	0	0.00%	0	0.00%	0	=
Northern Marianas Islands	0.00%	250	0%	250	0.00%	250	0%
Pakistan	0.00%	0	0.00%	0	0.00%	0	=
Palau	-	-	-	-	0.00%	0	-
Papua New Guinea	0.00%	0	0%	0	0.00%	0	=
Philippines	0.08%	6,000	0.07%	5,299	0.09%	6,603	25%
Samoa	-	-	-	-	0.00%	0	-
Singapore	0.02%	1,894	0.03%	2,000	0.03%	2,000	0%
Solomon Islands	0.00%	0	0%	90	0.00%	110	22%
Sri Lanka	-	-	-	-	0.00%	0	-
Taiwan	0.00%	0	0.00%	0	0.00%	0	=
Thailand	-	-	-	-	0.00%	0	-
Timor-Leste	-	-	-	-	0.00%	0	-
Tokelau	-	-	-	-	0.00%	0	-
Tonga	-	-	-	-	0.00%	0	-
Tuvalu	-	-	-	-	0.00%	0	-
Vanuatu	0.00%	330	0%	66	0.00%	129	95%
Vietnam	0.00%	170	0%	170	0.00%	370	118%
Wallis and Futuna	-	-	-	-	0.00%	0	-

North, Central and South America – Change to numbers over time

COUNTRY	World Share 2004	Total Machines 2004	World Share 2006	Total Machines 2006	World Share 2008	Total Machines 2008	% Change 2006-2008
Canada	1.1%	82,633	1.08%	85,516	1.20%	91,905	7%
United States	9.1 %	687,725	9.34%	740,475	10.64%	816,682	10%
Anguilla	0.00%	0	0.00%	0	0.00%	0	=
Antigua and Barbuda	0.01%	735	0.01%	765	0.01%	765	0%
Aruba	0.04%	2,718	0.03%	2,445	0.04%	3,291	35%
Argentina	0.16%	12,543	0.17%	13,105	0.20%	14,959	14%
Bahamas	0.04%	2,655	0.03%	2,027	0.02%	1,901	-6%
Barbados	0.00%	0	0.00%	25	0.00%	25	=
Bolivia	0.00%	412	0%	0	0.00%	0	=
Brazil	0.18%	13,570	0%	0	0.00%	0	=
Bermuda	0.00%	0	0.00%	0	0.00%	0	=
Belize	0.00%	430	0.01%	430	0.01%	830	93%
British Virgin Islands	-	-	-	-	0.00%	0	-
Caymen Islands	0.00%	0	0.00%	0	0.00%	0	-
Chile	0.04%	3,088	0.04%	3,086	0.05%	3,611	17%
Colombia	0.13%	9,446	0.49%	39,000	0.02%	1,781	-95%
Costa Rica	0.00%	0	0.01%	771	0.02%	1,525	98%
Cuba	0.00%	0	0.00%	0	0.00%	0	=
Dominica	0.00%	0	0.00%	0	0.00%	0	=
Dominican Republic	0.01%	811	0.02%	1,326	0.02%	1,370	3%
Ecuador	0.01%	777	0.01%	767	0.01%	990	29%
El Salvador	0.00%	100	0%	100	0.00%	100	=
Falkland Islands	-	-	-	-	0.00%	0	-
Guatemala	-	-	-	-	0.00%	190	-
Grenada	-	-	-	-	0.00%	0	-

North, Central and South America – Change to numbers over time (cont.)

COUNTRY	World share 2004	Total machines 2004	World share 2006	Total machines 2006	World share 2008	Total machines 2008	% Change 2006-2008
Guyana	-	-	-	-	0.00%	0	-
Haiti	0.00%	80	0%	80	0.00%	80	=
Honduras	0.00%	10	0%	55	0.00%	55	=
Jamaica	0.01%	652	0.09%	6,800	0.01%	807	-88%
Mexico	0.00%	0	0.00%	0	0.00%	134	100%
Montserrat	0.00%	0	0.00%	0	0.00%	0	=
Netherlands Antilles	0.03%	2,618	0.07%	5,149	0.07%	5,161	0%
Nicaragua	0.01%	721	0.04%	2,865	0.01%	686	-76%
Panama	0.02%	1,141	0.04%	3,438	0.04%	3,438	=
Paraguay	0.00%	168	0%	251	0.00%	168	-33%
Peru	0.16%	12,246	0.22%	17,285	0.11%	8,327	-52%
Puerto Rico	0.06%	4,732	0.06%	4,795	0.07%	5,062	6%
Saint Bartholemy	-	-	-	-	0.00%	0	-
Saint Helena	-	-	-	-	0.00%	0	-
Saint Lucia	-	-	-	-	0.00%	330	-
Saint Pierre and the Miquelon	-	-	-	-	0.00%	0	-
Saint Vincent and the Grenadines**	0.00%	50	0%	50	0.00%	80	-
St Kitts & Nevis	0.00%	453	0.01%	453	0.01%	853	88%
St Martin	0.00%	0	0.00%	0	0.00%	0	=
Suriname	0.00%	250	0.01%	453	0.01%	752	66%
Turks and Caicos Isles	0.00%	0	0%	0	0.00%	123	100%
Trinidad and Tobago	-	-	-	-	0.00%	201	-
Uruguay	0.03%	2100	0.04%	2,703	0.03%	2,630	-3%
Venezuela	0.00%	198	0%	367	0.01%	670	83%
Virgin Islands	-	-	-	-	0.00%	360	-

Europe and Middle East - Change to numbers over time

Country	World share 2004	Total machines 2004	World share 2006	Total machines 2006	World share 2008	Total machines 2008	% Change 2006-2008
Afghanistan	0.00%	0	0.00%	0	0.00%	0	=
Albania		0	0%	240	0.00%	240	=
Andorra	0.00%	0	0.00%	0	0.00%	0	=
Armenia		0	0%	45	0.00%	90	100%
Austria	0.56%	43,209	0.02%	1,809	0.03%	2,290	27%
Azerbaijan	0.00%	32	0%	0	0.00%	0	=
Bahrain	0.00%	0	0.00%	0	0.00%	0	=
Bosnia/Herzegovina		0	0%	80	0.00%	116	45%
Belarus		0	0%	119	0.00%	319	168%
Belgium	0.61%	46,065	0.34%	27,264	0.43%	32,784	20%
Brunai	0.00%	0	0.00%	0	0.00%	0	=
Bulgaria	0.08%	6000	0.08%	6,000	0.20%	15,000	150%
Croatia	0.51%	39,426	0.06%	5,000	0.02%	1,591	-68%
Cyprus	0.01%	1065	0.02%	1,854	0.03%	2,440	32%
Czech Republic	0.51%	38,972	0.66%	52,185	0.77%	59,018	13%
Denmark	0.25%	18,900	0.24%	19,000	0.32%	24,500	29%
Estonia	0.02%	1,354	0.01%	1,133	0.05%	3,568	215%
Faroe Islands	-	-	-	-	0.00%	0	-
Finland	0.20%	15,300	0.24%	19,000	0.23%	18,000	-5%
France	0.89%	67,420	0.24%	18,787	0.24%	18,695	0%
Georgia	0.00%	0	0.00%	301	0.00%	220	-27%
Germany	3.27%	248,500	2.56%	202,600	2.60%	200,000	-1%
Gibraltar	0.00%	290	0%	290	0.00%	290	-100%
Greece	0.03%	2,122	0.05%	3,727	0.00%	2,537	-100%
Greenland	0.00%	0	0.00%	0	0.00%	0	=
Guernsey	-	-	-	-	0.00%	0	-
Hungary	0.42%	32,900	0.42%	33,141	0.40%	30,693	-7%
Iceland	-	-	-	-	0.01%	1,075	-

Europe and Middle East - Change to numbers over time (cont.)

COUNTRY	World share 2004	Total machines 2004	World share 2006	Total machines 2006	World share 2008	Total machines 2008	% Change 2006-2008
Iran	-	-	-	-	0.00%	0	-
Iraq	0.00%	0	0.00%	0	0.00%	0	=
Ireland	0.17%	12,887	0.16%	12,591	0.12%	9,159	-27%
Israel	0.00%	63	0%	63	0.00%	63	=
Italy	5.16%	392,100	5.17%	410,000	2.60%	200,000	-51%
Jordan	0.00%	0	0.00%	0	0.00%	0	=
Kuwait	0.00%	0	0.00%	0	0.00%	0	=
Kazakhstan	-	N/A	0.38%	30,000	0.00%	190	-99%
Kyrgyzstan	0.00%	0	0.00%	26	0.00%	26	=
Latvia	0.13%	10,032	0.17%	13,802	0.22%	16,974	23%
Lebanon	0.00%	365	0%	402	0.01%	397	-1%
Liechtenstein	-	-	-	-	0.00%	0	-
Lithuania	-	-	-	-	0.01%	567	-
Luxembourg	0.00%	218	0%	264	0.00%	280	6%
Macedonia	0.00%	128	0%	128	0.00%	177	38%
Malta	-	-	-	-	0.00%	0	-
Man. Isle of	0.01%	1,062	0%	180	0.00%	180	=
Moldova	0.00%	0	0.00%	6	0.00%	0	-100%
Monaco	0.03%	2028	0.03%	2,028	0.03%	2,028	=
Montenegro	-	-	-	-	0.00%	0	-
Netherlands	0.08%	6,325	0.11%	8,452	0.11%	8,306	-2%
Norway	0.39%	30,355	0.38%	30,000	0.24%	18,500	-38%
Oman	0.00%	0	0.00%	0	0.00%	0	=
Poland	0.00%	458	0.63%	50,000	0.25%	18,917	-62%
Portugal	0.27%	20,378	0.15%	11,910	0.08%	6,000	-50%
Qatar	-	-	-	-	0.00%	0	-
Romania	0.01%	688	0.39%	31,000	0.01%	876	-97%
Russia	0.05%	117,500	3.22%	255,494	4.69%	360,000	41%
San Marino	-	-	-	-	0.00%	0	-
Saudi Arabia	0.00%	0	0.00%	0	0.00%	0	=
Serbia	-	-	-	-	0.01%	777	-
Slovakia	0.00%	58	0.15%	12,000	0.00%	138	-99%
Slovenia	0.03%	2,402	0.04%	3,206	0.06%	4,369	36%

Europe and Middle East - Change to numbers over time (cont.)

COUNTRY	World share 2004	Total machines 2004	World share 2006	Total machines 2006	World share 2008	Total machines 2008	% Change 2006-2008
Spain	3.30%	250,947	3.20%	253,734	3.20%	245,966	-3%
Svalbard	-	-	-	-	0.00%	0	-
Sweden	0.09%	7,046	0.10%	7,862	0.10%	7,862	=
Switzerland	0.15%	11,300	0.04%	3,417	0.04%	3,429	0%
Tajikistan	0.00%	0	0.00%	0	0.00%	0	=
Turkey	0.00%	0	0.00%	0	0.00%	0	=
Turkmenistan	0.00%	180	0%	165	0.00%	165	=
Ukraine	0.00%	179	1.00%	80,000	0.01%	812	-99%
United Arab Emirates	0.00%	0	0.00%	0	0.00%	0	=
United Kingdom	3.35%	255,000	3.50%	269,616	2.82%	216,626	-20%
Uzbekistan	-	-	-	-	0.00%	0	-
Vatican City	-	-	-	-	0.00%	0	-
Yemen	-	-	-	-	0.00%	0	-

**Prior to 2008 data collected was for Saint Vincent only. From 2008 data collected represents Saint Vincent and the Grenadines.

Africa – Change to numbers over time

Country	World share 2004	Total machines 2004	World share 2006	Total machines 2006	World share 2008	Total machines 2008	% Change 2006-2008
Algeria	0.00%	0	0.00%	0	0.00%	0	=
Angola	-	-	-	-	0.00%	0	-
Benin	-	-	-	-	0.00%	10	-
Botswana	0.00%	489	0%	132	0.01%	582	341%
Burkina Faso	-	-	-	-	0.00%	0	-
Burundi	-	-	-	-	0.00%	0	-
Cameroon	0.00%	42	0%	42	0.00%	116	176%
Cape Verde	-	-	-	-	0.00%	0	-
Central African Republic	-	-	-	-	0.00%	0	-
Chad	0.00%	0	0.00%	0	0.00%	0	=
Congo (DRC)	0.00%	100	0%	100	0.00%	100	=
Congo Republic	0.00%	0	0%	0	0.00%	0	=
Comoros	0.00%	28	0%	28	0.00%	28	=
Cote d'Ivoire		0	0%	120	0.00%	0	-100%
Djibouti		0	0%	40	0.00%	40	=
Egypt	0.00%	275	0%	347	0.01%	645	86%
Equatorial Guinea	-	-	-	-	0.00%	136	-
Eritrea	0.00%	0	0.00%	0	0.00%	0	=
Ethiopia	0.00%	0	0.00%	0	0.00%	0	=
Gabon	0.00%	0	0.00%	0	0.00%	0	=
Gambia	0.00%	0	0.00%	0	0.00%	0	=
Ghana	0.00%	0	0%	82	0.00%	100	22%
Guinea	0.00%	0	0.00%	0	0.00%	0	=
Guinea-Bissau	-	-	-	-	0.00%	0	-
Kenya	0.01%	720	0.01%	720	0.01%	720	=
Lesotho	0.00%	160	0%	141	0.00%	141	=
Liberia	-	-	-	-	0.00%	32	-
Libya	0.00%	0	0.00%	0	0.00%	0	=
Madagascar	0.00%	240	0%	290	0.00%	290	=

Africa – Change to numbers over time (cont.)

Country	World share 2004	Total machines 2004	World share 2006	Total machines 2006	World share 2008	Total machines 2008	% Change 2006-2008
Mali	-	-	-	-	0.00%	0	-
Malawi	-	-	-	-	0.00%	146	-
Mauritania	0.00%	0	0.00%	0	0.00%	0	=
Mauritius	0.01%	641	0%	658	0.01%	621	-6%
Mayotte	-	-	-	-	0.00%	0	-
Morocco	0.00%	129	0.01%	744	0.01%	725	-3%
Mozambique	0.00%	118	0%	118	0.00%	182	54%
Namibia	0.01%	564	0%	564	0.01%	519	-8%
Niger	-	-	-	-	0.00%	0	-
Nigeria	0.00%	40	0%	40	0.00%	40	=
Reunion	0.00%	240	0%	256	0.00%	256	=
Rwanda	0.00%	0	0.00%	0	0.00%	0	=
Sao Tome and Principe	-	-	-	-	0.00%	0	-
Senegal	0.00%	170	0%	170	0.00%	350	106%
Seychelles	0.00%	246	0%	124	0.00%	124	=
Sierra Leone	0.00%	0	0.00%	0	0.00%	0	=
Somalia	0.00%	0	0.00%	0	0.00%	0	=
South Africa	0.26%	19,382	0.34%	27,320	0.28%	21,206	-22%
Swaziland	0.00%	268	0%	266	0.00%	274	3%
Syria	0.00%	0	0.00%	0	0.00%	0	=
Sudan	0.00%	0	0.00%	0	0.00%	0	=
Tanzania	0.00%	342	0%	366	0.01%	394	8%
Togo	0.00%	0	0.00%	0	0.00%	0	=
Tunisia	0.00%	649	0%	449	0.01%	419	-7%
Uganda	0.00%	20	0%	20	0.00%	210	950%
Western Sahara	-	-	-	-	0.00%	0	-
Zambia	0.00%	167	0%	167	0.00%	167	=
Zimbabwe	0.00%	417	0%	407	0.00%	370	-9%