MGA

Interim Report 2024

Contents

Key Highlights

Supervisory Activities

- As part of our process to assess applications, a total of 611 criminal probity screening checks were carried out on individuals, shareholders, ultimate beneficial owners, key individuals, and businesses from both the land-based and online gaming sectors. Applications of a more complex nature were escalated to the Fit and Proper Committee, which made 29 decisions. In seven cases, the Committee determined that the criteria to be considered as fit and proper were not met.
- The Supervisory Council reviewed 15 gaming licence applications, covering both applications to obtain a new gaming licence as well as to renew an existing licence, out of which two were rejected on the grounds that information or submissions made to the Authority with respect to such licence applications were found to be false, misleading, inaccurate, or materially incomplete.
- We received 11 applications for new gaming licences and issued eight licences. In addition, we have received a further seven gaming licence renewal applications from operators to renew their gaming licence which was bound to expire in 2024 and issued four licence renewals.
- We concluded 11 compliance audits and 49 desktop reviews. Furthermore, the Authority was notified by its licensees of 16 Technical – Information Security Incidents. Such licensees were investigated by the Authority to ensure that no licensed activity was adversely affected.
- The Commercial Communications Committee took six decisions regarding possible breaches of the Gaming Commercial Communications Regulations (S.L. 583.09).
- We also issued 20 warnings, 10 administrative penalties, suspended two licences and cancelled eight licences. We also issued €128,800 in administrative penalties and three regulatory settlements amounting to €61,522.
- During this period, 13 AML/CFT Compliance Examinations were initiated by the FIAU or by us on its behalf. Furthermore, 23 such Compliance Examinations were concluded. During the same period, the FIAU imposed administrative penalties on three of our licensees amounting to just under €185,000.
- Interviews were carried out on 19 prospective MLROs and key persons carrying out AML/CFT functions to assess their suitability and knowledge of the Maltese AML/CFT legal framework.

- In our efforts to safeguard players and promote responsible gambling, we supported a total of 1,625 players who requested assistance (including spill-over from 2023) during the period under review.
- Furthermore, in our mission to continuously endeavour to safeguard player funds, during the reporting period we received 962 player funds reports and carried out 16 data extractions.
- We carried out 12 responsible gambling themed website checks, and seven observation letters were issued to licensees outlining the responsible gambling issues and identifying areas of improvement. We investigated 10 cases of websites having misleading information and published nine notices on our website.
- During the reporting period, we carried out 4,757 inspections on Gaming Premises (including Casinos and Commercial Bingo Halls), Controlled Gaming Premises, National Lottery Outlets and non-profit tombola.

National and International Cooperation

- As part of our efforts in the fight against the manipulation of sports competitions by ensuring sports integrity, we received 162 suspicious betting reports from licensees and other interested parties. We shared 143 alerts on suspicious betting with licensees and participated in 11 investigations. Furthermore, we collaborated with enforcement agencies, sports governing bodies, integrity units and other regulatory authorities on 17 requests for information and participated in 23 instances of data exchanges.
- We received 35 requests for international collaboration from other regulators, and we sent 22 requests ourselves. The requests received were mostly related to background checks as part of authorisations processes, or requests for information about the local regime.
- We issued 28 official replies to provide feedback on the regulatory good standing of our licensed operators to the relevant authorities requesting this information.
- During the reporting period, we collaborated with local regulating authorities and governing bodies on 69 requests for information.

Regulatory Overview

This section summarises our regulatory activities from January to June 2024.

Authorisation Activities

During the first half of 2024, we received a number of authorisation requests, including those for new gaming licences and licence renewals, key function certificates, and requests to modify existing authorisations.

With the introduction of the new licensing regime in 2018, we further supported the growth of business-to-business (B2B) activities by offering a Critical Supply Licence authorisation. Since then, we have noted an increasing number of B2B authorisations that continued to be reflected during the current reporting period, both in terms of the new gaming applications received and issued as well as in the gaming licences renewed.

To this end, 63.6% of the total new gaming applications received were for a Critical Supply Licence and six out of the eight new gaming licences issued referred to a Critical Supply Licence authorisation.

Following the overhaul of the Gaming Act (Chapter 583 of the Laws of Malta) in 2018, gaming licences were extended to a validity period of 10 years, as stipulated in the Gaming Act. Consequently, licences already active in 2018 were extended by an additional five years to align with the ten-year term, resulting in the first licence renewals becoming due in 2023.

To ensure continuity, licensees must submit a renewal application within the specified timeframes before their licence expires. The renewal process involves the

Figure 1: Statistics on New Gaming Licences Jan-Jun 2024

11 New Gaming Licence Applications Received

8 New Gaming Licences Issued

9 New Gaming Licence Applications Rejected or Withdrawn
including spillover from 2023

Figure 2: Statistics on Gaming Licences Renewals Jan – Jun 2024

7 Licence Renewal Applications Received

4 Renewed Gaming Licences

submission of updated due diligence documentation for the licensee's Directors and Qualifying Beneficial Owners, along with the successful completion of a compliance audit.

The renewal review is founded on two key pillars:

1. Due Diligence Review – This involves thorough checks on the Directors, Qualifying Beneficial Owners, and all entities within the corporate structure to confirm their fitness and propriety.
2. Compliance Audit Report – Licensees are required to appoint an approved audit service provider to carry out the compliance audit.

Upon successful completion of these reviews, licence renewals are granted under Regulation 4 of the Gaming Authorisations Regulations (S.L. 583.05) for a further ten-year term.

In terms of the gaming licence renewal applications that we received, 57.1% were for a Critical Supply Licence, while 60.0% of the gaming licence renewals that we issued referred to an authorisation of a Critical Supply Licence.

Recognition Notices

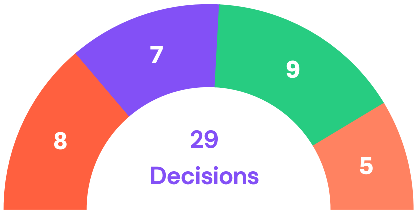
Between January and June of 2024, we received 31 applications for new recognition notices and issued 30 recognition notice certificates. The certificates are valid for a period of one year before requiring renewal.

Fit and Proper Consideration

As part of the process to assess gaming licence applications, we carry out criminal probity checks on individuals, shareholders, ultimate beneficial owners, key individuals, and businesses from both the land-based and online gaming sectors. These checks aim to establish the 'fit and properness' standing of both legal and natural persons involved for the prospective authorisation. To this end, we carried out 611 criminal probity checks. Applications which are considered to be of high-risk are escalated to the Fit and Proper Committee.

Fit and Proper Committee

Figure 3: Fit and Proper Committee Decisions Jan-Jun 2024



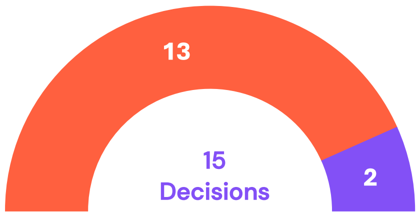
- Met the fit and proper criteria
- Did not meet the fit and proper criteria
- Referred for Further Considerations
- Procedural Matters

Between January and June 2024, the Fit and Proper Committee held 10 meetings during which it made 29 decisions in line with its policies and procedures. Of the cases reviewed, in eight cases, no concerns were identified that would indicate failure to meet the standards as established by the Authority, whilst in a further seven cases, the Committee determined that the criteria to be considered as fit and proper were not met. In the remaining 14 instances, the Committee referred the matter for further consideration, either to request or compile further information or to revisit its processes to enhance the fit and proper mechanism.

Supervisory Council

In line with our rigorous approach to upholding the integrity of the licensing process, we escalate gaming licence applications to the Supervisory Council. Between January and June 2024, the Supervisory Council convened 12 times, whereby 15 decisions were taken. To this end, 10 new gaming licence applications were reviewed by the Council, eight of which were approved, while two were rejected on the ground that the information or submission made to the Authority with respect to such licence applications was found to be false, misleading, inaccurate, or materially incomplete. In addition, five gaming licence renewal applications were escalated to the Council, all of which were approved.

Figure 4: Supervisory Council Decisions on Gaming Licence Applications Jan-Jun 2024



- Approved
- Rejected

Furthermore, as part of its functions, the Supervisory Council assessed nine share transfers conducted by licensees to ensure that such restructuring does not prejudice the licensee's fitness and propriety or otherwise hinder its suitability for a licence. In each instance, the Supervisory Council confirmed that it had no reservations about the share transfers presented for its review.

Compliance Activities

Throughout the lifetime of any gaming licence, our compliance function ensures that authorised licensees adhere to stipulated licence conditions and operate in line with the regulatory requirements.

Routine Compliance Checks

Figure 5: Number of Compliance Checks Jan-Jun 2024

During the first half of 2024, a total of 49 desktop reviews were carried out, which we further supplemented with 11 compliance audits. Such monitoring ensures that authorised persons are abiding by the gaming licence conditions and the legislative framework, and that in cases of non-compliance, the necessary actions are taken.

Licensees, in line with Articles 37(2)(c) and (d) of the Gaming Authorisations and Compliance Directive (Directive 3 of 2018), are required to submit a Technical – Information Security Incident [1] to the Authority in the case of: (i) any breach of the licensee's information security that adversely affects the confidentiality of information relating to players; and (ii) any breach of the licensee's information security that precludes players from accessing their accounts for a period exceeding 12 hours. In total, between January and June 2024, the Authority was notified of 16 Technical – Information Security Incidents. Such licensees were investigated by the Authority to ensure that no licensed activity was adversely affected.

During the first half of the year, we received 973 monthly reports from licensees offering B2B services. These reports include information on interrelationships between B2B operators and

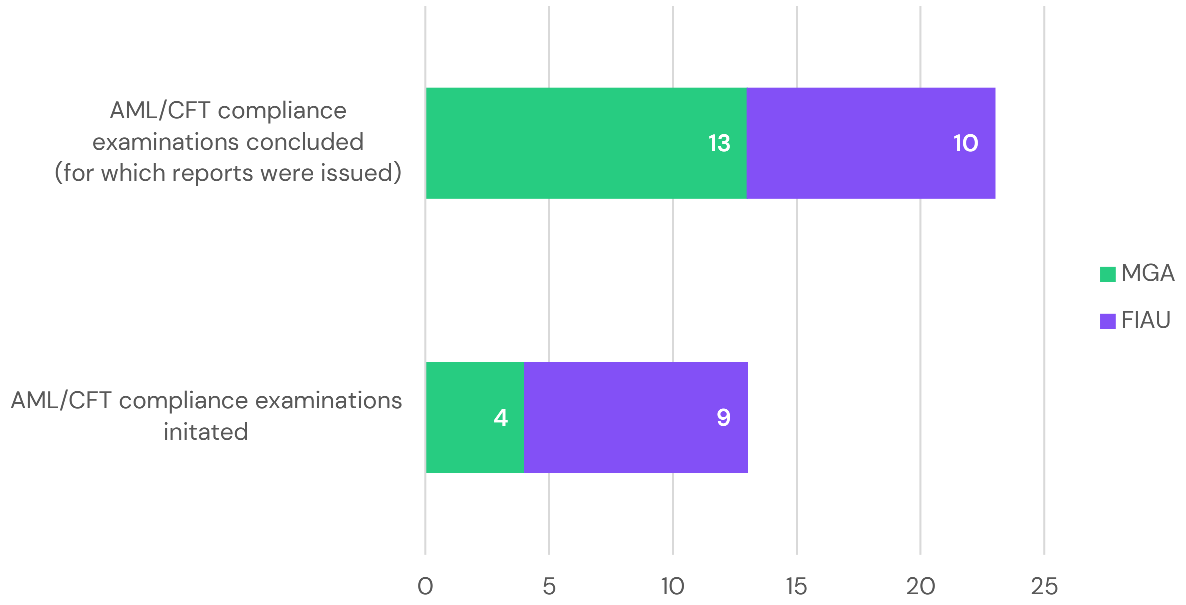
[1] During the first half of 2024, the MGA issued updates to the Incident Report mechanism available through the Licensee Portal, whereby it provided guidance and clarified the procedures for the submission of an Incident Report through the updated reporting instrument. This has provided more clear guidance to our operators on the type of Incident Report that should be escalated.

their business-to-consumer (B2C) and B2B clients and therefore provide an insight into the interchanges between operators.

AML/CFT Examination, Interviews and Enforcement Measures

Between January and June 2024, a total of 13 AML/CFT Compliance Examinations were initiated on our licensees, out of which four were initiated by the MGA and nine by the Financial Intelligence Analysis Unit (FIAU). Furthermore, we concluded a total of 23 AML/CFT Compliance Examinations for which reports were issued during the period under review, out of which 13 were issued by the MGA and 10 were issued by the FIAU.

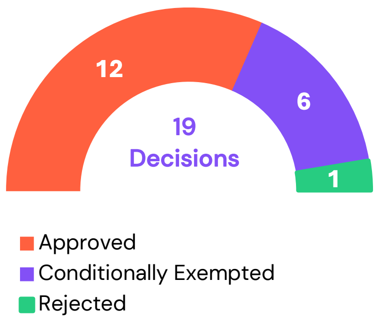
Figure 6: AML/CFT Examinations on Online Operators
Jan-Jun 2024



During the first half of 2024, three licensees were subject to administrative measures by the FIAU based on breaches identified during examinations. In total, the administrative penalties issued by the FIAU amounted to just under €185,000.

The Authority also carries out interviews with prospective Money Laundering Reporting Officers (MLROs).

Figure 7: Number of MLRO Interviews
Jan-Jun 2024



With the aim of further ensuring that the candidates have the right competence as well as the desired level of knowledge of the Maltese AML/CFT legal framework, we have restructured our procedures to improve the approval process. Between January and June 2024, we approved 12 candidates, rejected one and provided six candidates with a conditional exemption.

Sports Betting Integrity Reporting

As part of our commitment to take a proactive approach to managing sports betting integrity to address the threats posed by match-fixing and malicious sports betting, a dedicated reporting system is in place to identify suspicious betting and contribute to the battle against sports manipulation.

Figure 8: Number of Suspicious Betting Reports, Investigations and Alerts
Jan-Jun 2024

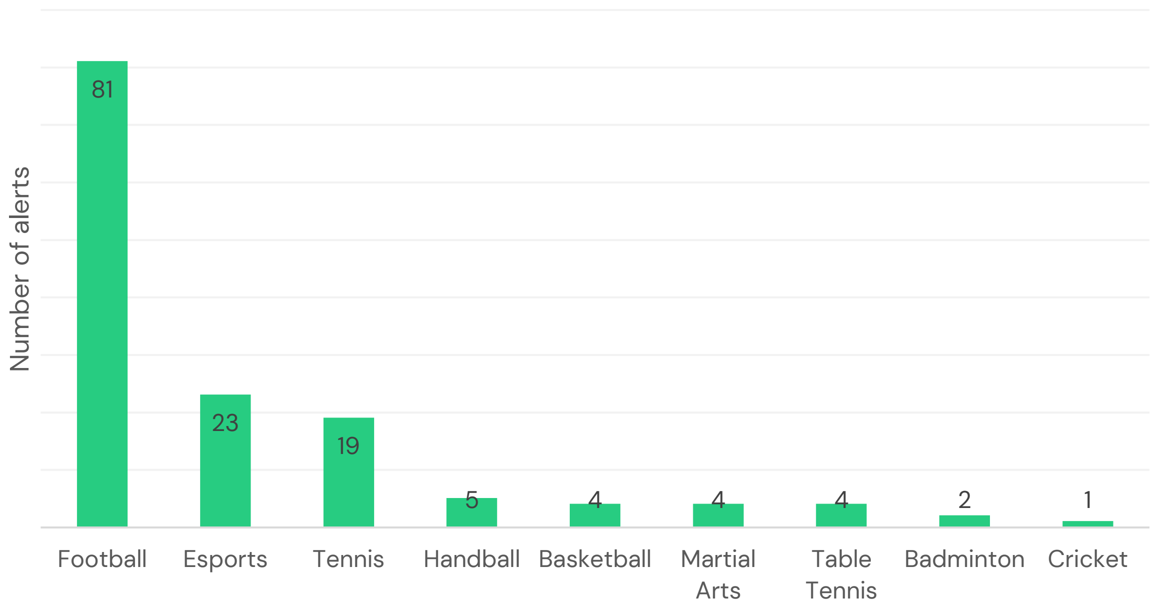
During the first half of 2024, licensees submitted a total of 162 suspicious betting reports, split between accounts and events. These reports mainly concerned different sports including, but not limited to, football, tennis and esports. In this regard, the basis for suspicion was mainly 'Stake and volumes above the average expectation for the market', which accounted for 31.7% of the reports submitted, or 'Activity focused on specific markets', which constituted another 26.7% of the reports submitted[2].

Furthermore, during the period under review, we shared 143 alerts with our licensees, out of which,

[2] It is to be noted that these figures do not represent a share of the total but rather their frequency, since these reports include more than one basis for suspicion.

52 reports containing high-level betting data were submitted to the relevant Sports Governing Bodies[3].

Figure 9: Alerts Shared with Licensees by Sport Type
Jan – Jun 2024



The various suspicious betting reports have led to 11 investigations, with the majority being related to football. We also collaborate with enforcement authorities, Sports Governing Bodies, integrity units and other regulatory entities worldwide. Between January and June 2024, we responded to 17 requests for information regarding sports activities and participated in 23 instances of data exchange.

[3] A Sports Governing Body is an organisation that prescribes final rules and enforces codes of conduct with respect to a sporting event, member clubs, and participants therein.

Inspections on Land-Based Establishments

As part of the monitoring process on the land-based sector, we carry out inspections on Gaming Premises (including Casinos and Commercial Bingo Halls), Controlled Gaming Premises, National Lottery Outlets and non-profit tombola. We fulfilled a 24/7 inspectorate presence in the licensed casinos and a scheduled presence at all the National Lottery draws. During the first six months of 2024, a total of 4,757 inspections were carried out. Furthermore, during the first six months, four compliance audits were carried out on gaming premises.

Figure 10: Number of Inspections Jan-Jun 2024

4,757 Inspections on Land-Based Establishments

Enforcement

The investigative and enforcement mechanisms which the Authority has in place enable us to take appropriate action whenever a licensee is found to be in breach of the Gaming Act and the binding instruments issued thereunder.

Compliance and Enforcement Committee

As part of our internal structures, we have a Compliance and Enforcement Committee which is responsible for evaluating the higher-risk breaches, and their potential enforcement measures. These measures include cease and desist letters, warnings, administrative penalties, suspensions, and cancellations of authorisations issued by the Authority. When the violations under consideration constitute a criminal offence, the Committee decides whether to proceed with a formal complaint to the Malta Police Force (MPF) or by means of a regulatory settlement as an alternative to criminal proceedings. Between January and June 2024, the Compliance and Enforcement Committee convened 13 times and made 19 decisions, which resulted in a total of 10 enforcement actions.

Figure 11: Summary of Enforcement Actions Jan-Jun 2024

20 Warnings

10 Administrative Penalties

2 Suspensions

8 Cancellations

Typically, prior to the issuance of an enforcement measure, the Authority sends out notifications regarding the prospective breaches and enforcement measures. This gives the recipient an opportunity to rebut and contest the alleged breaches and proposed enforcement measures deemed appropriate by the Authority. Between January and June 2024, we issued 23 such notices, a total of 40 enforcement actions, including 20 warnings, 10 administrative penalties that in total amounted to €128,880, two suspensions and eight cancellations as well as three regulatory settlements amounting to €61,522. Through the latter, the Authority confiscated proceeds made through licensees and unauthorised entities offering licensable services without being duly authorised and in breach of the Gaming Act.

Player Protection and Responsible Gambling

Our primary objective is to ensure that licensees offer a safe, sustainable and responsible gaming environment, whilst having the necessary controls in place to protect minors and vulnerable individuals.

Requests for Assistance

Figure 12: Number of Requests for Assistance Received Jan-Jun 2024

1,432 Requests for Assistance

When players approach us with responsible gambling concerns, we assist as necessary, and investigations are conducted to ensure that our licensees are compliant with the relevant regulations. Since the introduction of Directive 5 of 2018, Alternative Dispute Resolution Directive (ADR), as of 1 April 2019, we started to distinguish between disputes and complaints. Over the years, we noted that the majority of requests received from players were of a dispute nature and such requests by players are directed to the ADRs, rather than processed by the Authority as complaints. To this end, with increased awareness, players are becoming more aware of the role of the ADR and are now more inclined to escalate their disputes directly with the ADRs. During the first six months of 2024, we received a total of 1,432 requests for assistance from players and resolved 1,625 requests, which included spill-over from 2023.

Protecting Player Funds

Figure 13: Number of Player Fund Reports Received, and Data Extractions Conducted Jan-Jun 2024

962 Player Funds Reports Received

16 Player Data Extraction

We assess the financial standing of licensed operators to ensure the continued viability of the business and, even more importantly, safeguard player funds – one of the principal regulatory objectives entrusted to us. B2C licensees are required by law to have sufficient funds to cover total player and jackpot funds. We ascertain this through the collection of monthly Player Funds Reports (PFRs), of which we received 962 between January and June 2024.

Furthermore, audits are carried out on player and jackpot funds held by licensees, as well as on the accounts held with credit, financial or payment institutions to cover such liabilities.

We have additional processes in place to ensure players are safeguarded in the event of a licence surrender or cancellation. In these cases, the licensee is subject to a data extraction, which gives us visibility of the players who are still owed funds by the licensee and have not been responsive in collecting the amounts in their accounts before changes to the gaming operation are effected by the licensee. Between January and June 2024, a total of 16 data extractions were effected.

Responsible Gambling Checks and Reviews

To ensure that licensees adhere to the requirements set by the Player Protection Directive (Directive 2 of 2018), we conduct responsible gambling website audits and analyse licensee websites. The focus here is placed on the interaction between the licensees and the players, as well as the responsible gambling-related functionalities on the operator's website. During the first half of the year, the Responsible Gambling team dedicated significant efforts to upskilling.

During this period, 12 responsible gambling website audits were conducted. These audits led to seven observation letters which were sent to licensees outlining their responsible gambling issues and explaining the necessary actions to be taken in order to be fully compliant with the regulations.

Figure 14: Responsible Gambling Audits and Observations Letters Jan-Jun 2024

Unauthorised URLs Investigations

Figure 15: Unauthorised URLs Investigations Jan-Jun 2024

In a proactive approach to safeguarding players, we investigate websites making misleading references to the Authority. Between January and June 2024, we found 10 URLs that contained misleading information and eventually published nine notices on our website.

Commercial Communications Committee

All commercial gaming communications brought to our attention by the general public or through the various regulatory and monitoring structures are evaluated by the Commercial Communications Committee. During the reporting period, the Committee took six decisions on possible breaches to the Gaming Commercial Communications Regulations (S.L. 583.09). The Committee found authorised persons to be in breach of regulations including, but not limited to, unsolicited commercial communications, communications which did not clearly display the required information, communications which did not include responsible gambling messages and/or communications being placed in prohibited locations such as public places or transportation.

Figure 16: Letters of Breach Jan-Jun 2024

The Committee notified third parties, such as media houses, about the breaches and advised them to rectify their position to comply with the law and, when required, forward the cases to the Compliance and Enforcement Committee for enforcement measures to ensue.

Collaboration

Throughout the years, we have fostered relationships and maintained active communication with key local and international stakeholders to exchange ideas and best practices for regulating the gaming industry.

International Cooperation

We firmly believe that exchanging best practices and learning from each other's experiences is essential to regulate a cross-border industry. To accomplish this, we keep open communication with our counterparts and respond to collaboration requests, as well as exchange relevant information and discuss experiences and challenges.

Between January and June 2024, we received 35 cooperation requests, with just over half originating from EU countries. The majority of these requests, (23 requests), sought information about the local framework and a further nine related to background checks as part of the authorisation process, while three referred to inquiries about alleged illegalities. On the other hand, we sent out a total of 22 cooperation requests, out of which 72.7% were sent to EU countries. All outgoing requests focused on background checks conducted as part of an authorisation process.

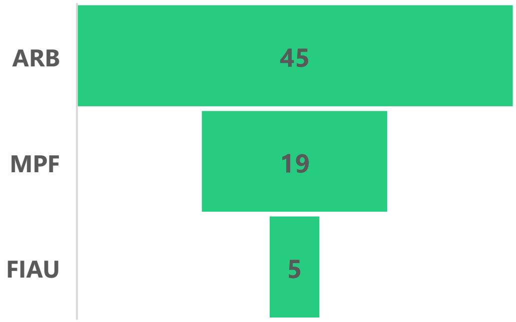
Figure 17: Official Replies Jan-Jun 2024

We also worked closely with other authorities by providing an official reply on the regulatory standing of our licensees. We confirm their good standing when this is the case and share relevant information and any adverse remarks regarding the licensees or associated persons, where required. During the reporting period, we issued 28 official replies.

Collaborations with Local Entities

We work with other local regulatory authorities as well as governing bodies to efficiently and effectively regulate the Maltese gaming industry. This is reflected in our responses to information requests on the gaming sector from the Asset Recovery Bureau (ARB), the FIAU, and the MPF. Additionally, relevant information is provided to the Sanction Monitoring Board (SMB) to assist in issuing penalties to legal and natural persons in case of failure to adhere to sanctions screening obligations. Between January and June of 2024, we received 69 requests for information from these entities.

Figure 18: Number of Requests for Information Jan-Jun 2024



Gaming Industry Statistics: January – June 2024

Preface

This section reviews the performance of gaming business activity licensed and regulated by the MGA for the first six months of 2024, in terms of developments in economic value added, employment and other headline indicators.

Methodology

1. These statistics relate to gaming business activity in Malta as licensed and regulated by the MGA. The sources used for statistical compilation are:

    - Industry Performance Returns (IPRs/Returns) submitted by operators in terms of Article 7(2)(d) of the Gaming Act;
    - Information provided by operators through specific questionnaires and correspondence with the MGA; and
    - Financial information provided by operators to the MGA.

2. The IPRs were disseminated amongst all the companies licensed by the MGA. To collect the necessary data, the licensed companies were asked to answer questions about the Maltese-licensed activity. At the cut-off date, the response rate for compiling the review was 96.8%. The Authority performed statistical imputations with respect to missing responses to derive a comprehensive analysis of the gaming industry operating in Malta.

3. A data cleaning process followed the data collection exercise to ensure the consistency of the results. In some cases, operators were contacted to clarify their responses. Omitted data was imputed through the appropriate techniques, and the answers to every question were analysed. Several imputation methodologies and weighting techniques were adopted to 'fill in' any missing information. Sample results were grossed up to obtain population data for all Maltese-licensed activities through appropriate weighting techniques.

4. The framework in place distinguishes between a "B2C – Gaming Service Licence" and a "B2B – Critical Supply Licence" as follows:

- B2C – Gaming Service Licence: Authorisation to a Maltese or EU/EEA entity to offer a gaming service from Malta to a Maltese person or through a Maltese legal entity.

- B2B – Critical Supply Licence: Authorisation to provide or carry out a critical gaming supply from Malta to a Maltese person or through a Maltese legal entity.

5. The Gaming Act specifies four game types, while the Gaming Authorisations and Compliance Directive (Directive 3 of 2018) establishes the verticals as follows:

   - Type 1 – Games of chance played against the house, the outcome of which is determined by a random generator, which includes casino-type games, such as roulette, blackjack, baccarat, poker played against the house, lotteries, secondary lotteries, and virtual sports games.

     The verticals falling under this game type are the following:

     - Casino Games, including Live Casino – This vertical includes a variety of games of chance and skill commonly played within the premises of a casino but are also offered online through various virtual platforms. These online casino games often use similar gambling equipment and mechanics to their physical counterparts and are accessible from anywhere with an internet connection. Live Casino games are played in real-time with a live dealer or croupier, either physically or remotely through a live stream. In the case of remote games, players can participate remotely from their computers or mobile devices and place bets on the outcome of the game, which is being broadcast live from either a dedicated studio or a land-based casino. The live dealer or croupier manages the game and interacts with the players, making it a more immersive and engaging experience compared to the traditional online casino games that use a random number generator.

     - Lotteries – This vertical includes any game of chance in which prizes are distributed by lot or chance among participants in the game.

     - Secondary Lotteries – This vertical includes games where players bet on the outcome of an official third-party lottery draw rather than participating directly in the lottery itself.

   - Type 2 – Games of chance played against the house, the outcome of which is not generated randomly but is determined by the result of an event or competition extraneous to a game of chance, whereby the operators manage their own risk by managing the odds offered to the player. One vertical falls under this game type, as follows:

- Fixed Odds Betting, including Live Betting – This vertical includes games in which a type of wagering is such that the payout for a winning bet is predetermined and fixed at the time the bet is placed. Live betting allows bettors to place bets on a variety of outcomes during a game, match or event.

- Type 3 – Games of chance not played against the house wherein the operator is not exposed to gaming risk but generates revenue by taking a commission or other charge based on the stakes or the prize, and which include player versus player games such as poker, bingo, betting exchange, and other commission-based games.

  The verticals falling under this game type are the following:

  - Pool Betting, including Betting Exchange – This vertical includes betting in which all bets on a particular event are placed into a pool, and the winning bettors share the pool proportionally according to the amount they have bet and the odds of their chosen outcome. A betting exchange is a type of online gambling platform where bettors can place bets against each other rather than against the house or bookmaker.

  - Peer-to-Peer Poker – This vertical includes games of poker in which the players play against each other and the operator derives revenue by way of charge.

  - Peer-to-Peer Bingo, and other Peer-to-Peer Games – This vertical includes games of bingo or other games in which players play against each other.

  - Lottery Messenger Services – This vertical includes types of online services that allow users to purchase lottery tickets from around the world through a third-party provider.

- Type 4 – Controlled skill games as per Regulation 8 of the Gaming Authorisations Regulations. One vertical falls under this game type, as follows:

  - Controlled Skill Games – This vertical includes skill games, activities in which the outcome is determined by the use of skill alone or predominantly by the use of skill, and are deemed as a licensable game.

6. Gaming operators are requested to submit to the Authority the Gaming Revenue (GR) data as defined by the Gaming Licence Fees Regulations (S.L. 583.03) and the Directive on the Calculation of Compliance Contribution (Directive 4 of 2018) instead of the Gross Gaming Revenue (GGR).

7. In terms of the compliance contribution figures reported in this document, the following should be noted:

   - For the land-based sector (excluding National Lottery), the compliance contribution from 2021 to June 2024 included the licence fees and levies and a 5% consumption tax on customers located in Malta, in line with the Gaming Tax Regulations (S.L. 583.10).

   - For National Lottery plc, the gaming tax was reported per the relevant regulations effective 5 July 2022. This changed under the new concession to include compliance contribution, levies, and a 5% consumption tax, in line with the Gaming Tax Regulations (S.L. 583.10).

   - For online gaming, the compliance contribution for 2021 to June 2024 included the licence fees and a 5% consumption tax on customers in Malta, in line with the Gaming Tax Regulations (S.L. 583.10).

8. Unless otherwise stated, the employment figures detailed in this report refer to Full-Time Equivalent (FTE) jobs at the end of each reporting period provided by the gaming operators (including both land-based and online companies holding B2C and B2B licences) in the IPRs submitted to the MGA. The methodology for collecting employment figures for the online gaming sector has been revised as from 2018. For this reason, the employment figures should not be compared with those published in previous years since the number of online gaming employees reported before 2018 also includes the number of outsourced/self-employed individuals directly engaged by gaming companies. Online gaming operators report their total employment in Malta in terms of two categories, as follows:

   - Type A: Employees directly employed with the MGA-licensed company, located in Malta and working solely on the gaming activities licensed by the MGA.

   - Type B: Additional staff in Malta employed by the MGA-licensed company that does not work on the MGA-licensed activities. Such staff typically includes:

     - Additional employees engaged with the licensed entity working in Malta on activities that are not licensed by the MGA; and/or

     - Employees that are employed with another associated/related company that is not licensed by the MGA.

9. The direct contribution of the gaming industry to the Maltese economy relates to gambling and betting activities (NACE 92), as per the European industrial activity classifications. The economic contribution is derived from the NSO data covering businesses operating in the Maltese territory, including firms not licensed by the MGA. At

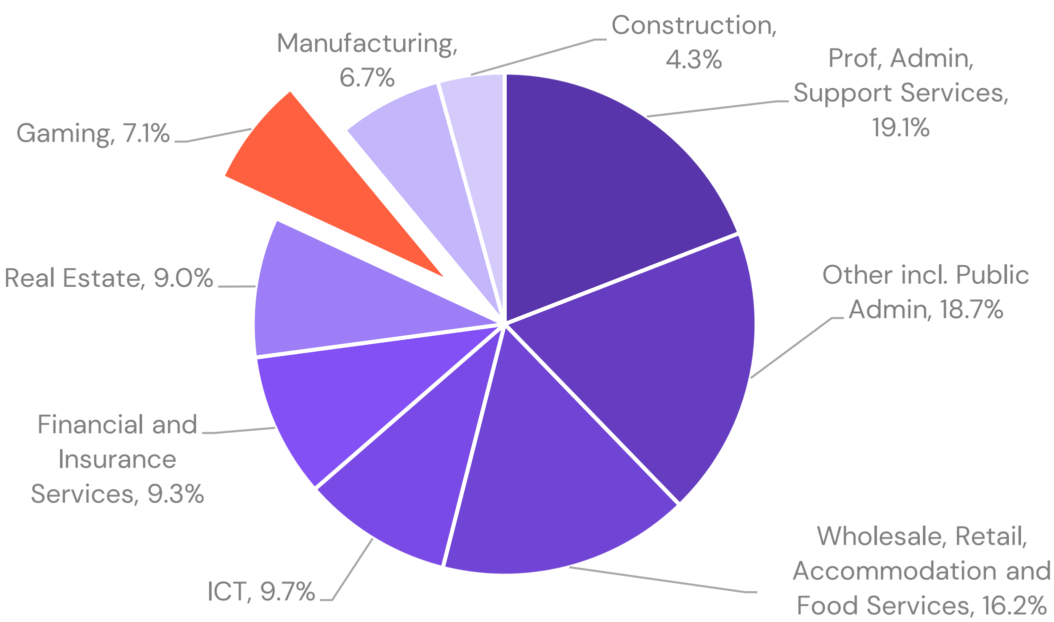
the industry level, gambling and betting activities in Malta are comprised of land-based casinos, gaming parlours, lotto receivers, the National Lottery operator, and online gaming companies (excluding activities of B2B operators).

10. The statistical figures reported for the previous periods have been revised to reflect any changes reported after publication.

Overview of the Maltese Gaming Industry

The Gross Value Added (GVA) generated by businesses within the gaming industry in Malta during the first half of 2024 amounted to €712.6 million[4], representing around 7.1% of the economy total. When the indirect effects are included, the industry's contribution to the economy value added amounts to 10.7%. The growth in the value added of the gaming industry during the first half of 2024 is estimated at 5.7% over the same period of 2023. The direct contribution of the gaming industry to economic activity has thus been relatively stable at around 7% since 2022.

Chart 1: The Relative Share of the Gaming Industry in total GVA (Jan-Jun 2024)



Note: The total percentage does not add up to 100% due to rounding of figures.

As of the end of June 2024, the number of companies licensed by the MGA - including online and land-based entities - stood at 315. These gaming companies held a total of 325 gaming licences and 291 approvals to offer various types of games under the B2C licence and a further 215 approvals to offer various game types under the B2B licence. These approvals are then

[4] Source: National Statistics Office

divided into multiple verticals. The evolution of the number of companies over the past three years, shown in Table 1, is also indicative of the relative stability of activity in the sector.

In the first half of 2024, the Authority collected €41.4 million in compliance contribution, licence fees, levies, and consumption tax.

Table 1: Headline Indicators

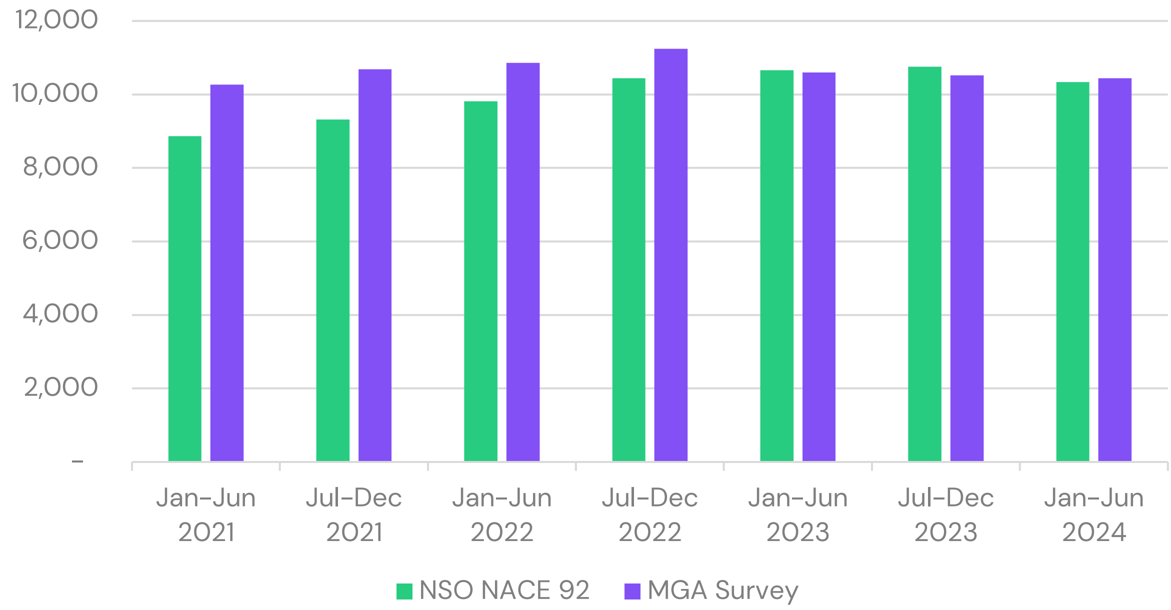
	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Number of licences (*Note 1*)	337	351	363	358	345	326	**325**
Number of companies (*Note 1*)	328	341	357	350	335	316	**315**
Employment (*Note 2*)	12,106	12,537	13,645	13,384	13,870	13,404	**13,862**
Land-Based	770	766	755	880	892	910	**919**
Online – Type A	9,496	9,919	10,106	10,365	9,729	9,609	**9,522**
Online – Type B	1,840	1,852	2,784	2,139	3,249	2,885	**3,421**
Compliance contribution, licence fees, levies and consumption tax (€m)	37.9	40.0	39.8	38.8	41.2	39.4	**41.4**

Note 1: The reported number of licences and companies include both online and land-based and relates to figures as of the end of June and December respectively. These figures refer solely to MGA-licensed entities and include the active licences base, that is, those entities that have a valid licence to offer a gaming service. Figures as of 2022 are not comparable to previous reporting periods due to a change in the definition of what constitutes an active licence and company, which as of 2022, includes those that are active, voluntarily suspended or suspended.

Note 2: The employment figures represent the number of FTEs employed with B2C and B2B licensees and refer solely to companies holding an MGA licence. The figures relate to stock as of the end of June and December respectively and refer solely to MGA-licensed entities.

It is estimated that at the end of June 2024, there were 10,441 employees working with MGA-licensed companies on activities covered by the Authority's licence. Of these, 9,522 employees (91.2%) were engaged in the online sector.

Chart 2: Employment (FTE) with MGA-licensed companies on the activities covered by the Authority's licence



Note: NSO NACE 92 data refers to the period mid-point. MGA survey data refers to the end-of-period point. Enterprise coverage varies slightly between the two sources.

Furthermore, our gaming operators report their total employment in Malta under two types: Type A and Type B[5]. For the period under review, an additional 3,421 FTEs were estimated to have been working with MGA-licensed companies on activities licensed under other jurisdictions or providing direct services to MGA-licensed firms while employed by another associated/related company. To this end, the employment generated in the gaming industry in Malta, when considering the total of Type A and Type B employment, is estimated to stand at 13,862 as at the end of June 2024, representing approximately 5% of the total workforce[6]. This has practically remained unchanged from the same period last year.

[5] For more information on employment, please refer to Point 8 of the Methodology.

[6] National Statistics Office, Registered Employment June 2024 (NR216/2024)

9,522
Employees in Malta working on online MGA-licensed activities.
2.1% less than the same period last year.

3,421
Employees in Malta working on online activities not licensed by the MGA.
5.3% more than the same period last year.

919
Employees working in the land-based establishments in Malta
3.4% more than the same period last year.

13,862
Employees in Malta working with companies holding an MGA licence.

Gaming Industry Outlook

The online gaming industry continues to grow at a global level, with an increasing demand driven by advancements in technology, improved internet accessibility, and changing consumer preferences. Europe remains a key market, accounting for a significant share of the industry's revenues, with demand for diverse and interactive gaming platforms surging, particularly in countries with high broadband penetration and a younger demographic. E-sports and live casino gaming have further fuelled growth, with players seeking immersive experiences.

Regulatory trends across Europe, however, could pose challenges for online gaming operators. A number of countries have introduced stricter regulatory frameworks, including higher taxes, advertising restrictions, and tighter licensing conditions. These developments may reduce the attractiveness of operating in those jurisdictions. Nonetheless, Malta's licensing framework remains competitive due to its robust, player-centric regulations issued by the MGA. The Authority's reputation for fairness, transparency, and innovation has cemented Malta as a leading hub for online gaming operators targeting European markets.

Malta's advantages extend beyond its regulatory framework, supported by a professional ecosystem that includes legal, financial, and compliance experts specialising in online gaming. However, increasing competition from other jurisdictions necessitates ongoing innovation in policy and initiatives.

Malta's online gaming sector is expected to sustain its performance, underpinned by global demand trends, its competitive licensing framework, and its reputation as a stable and innovative hub. While the sector operates in an environment of constantly evolving regulations, Malta's strategic position, expertise, and resources ensure that growth will remain stable and manageable in the coming years.

Detailed Statistical Report on the Land-Based Gaming Activities

Distribution of Land-Based B2B Licences by Game Type

The current licensing regime categorises all games that licensees can offer into four game types[7] , and an operator can offer one or multiple game types. There was a total of three B2B Land-Based licensees at the end of June 2024, each of which had an approval to offer Casino games, including Live Casino Setup and Live Virtual Sports games. One of these licensees also held an approval to offer Fixed Odds Betting, including Live Betting while another B2B licensee held approval to offer Pool Betting, including Betting Exchange.

Table 2: Land-based – B2B – Game Types Verticals end-June 2024

Type 1	3
Casino Games, including Live Casino	3
Type 2	1
Fixed Odds Betting, including Live Betting	1
Type 3	1
Peer-to-Peer Bingo/Poker	1
Type 4	0
Games of Skill	0

Gaming Premises – Casinos

There are four licensed casinos in Malta: Dragonara Casino, Portomaso Casino, and Casino Malta, which are located in the central part of the country, and Oracle Casino, located in the north side of the island.

[7] For more information on the game types, please refer to Point 5 of the Methodology.

Gaming Premises – Casinos: Game Types

At the end of June 2024, all casino-licensed establishments had approval to offer Type 1 and Type 3 games, while three of the four casinos had also a Type 2 approval. Each game type is further classified into the verticals offered for each type, as presented in Table 3[8].

Table 3: Gaming Premises - Casinos – Game Types Verticals end-Jun 2024

Type 1	4
Casino Games, including Live Casino	4
Type 2	3
Fixed Odds Betting, including Live Betting	3
Type 3	4
Peer-to-Peer Bingo/Poker	4
Type 4	0
Games of Skill	0

Gaming Premises – Casinos: Number of Gaming Devices

At the end of June 2024, the total number of gaming devices in the casinos stood at 946, including 937 slot-type gaming machines and 9 sports betting terminals.

Table 4: Gaming Premises - Casinos - Number of Gaming Devices

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Slot-type gaming devices	908	887	880	897	896	903	**937**
Sports betting machines	17	17	12	12	12	22	**9**
Total	925	904	892	909	908	925	**946**

[8] The table shows an abridged list of the gaming verticals, where only those being used are shown. For a full list of the gaming verticals, please refer to Point 5 of the Methodology.

Gaming Premises – Casinos: New Players' Registrations

Casino operators are required to register every new-to-the-casino player who enters their premises. Between January and June 2024, licensed operators reported 91,857 registrations in their establishments, including multiple registrations by a single player in more than one casino. This number is comparable to that during the same period in 2023, and it is significantly higher than the numbers reported in 2021 and 2022 which were still characterised by the post-COVID recovery.

Table 5: Gaming Premises - Casinos - New Players' Registrations

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total	15,777	59,485	60,068	110,235	91,246	134,216	**91,857**

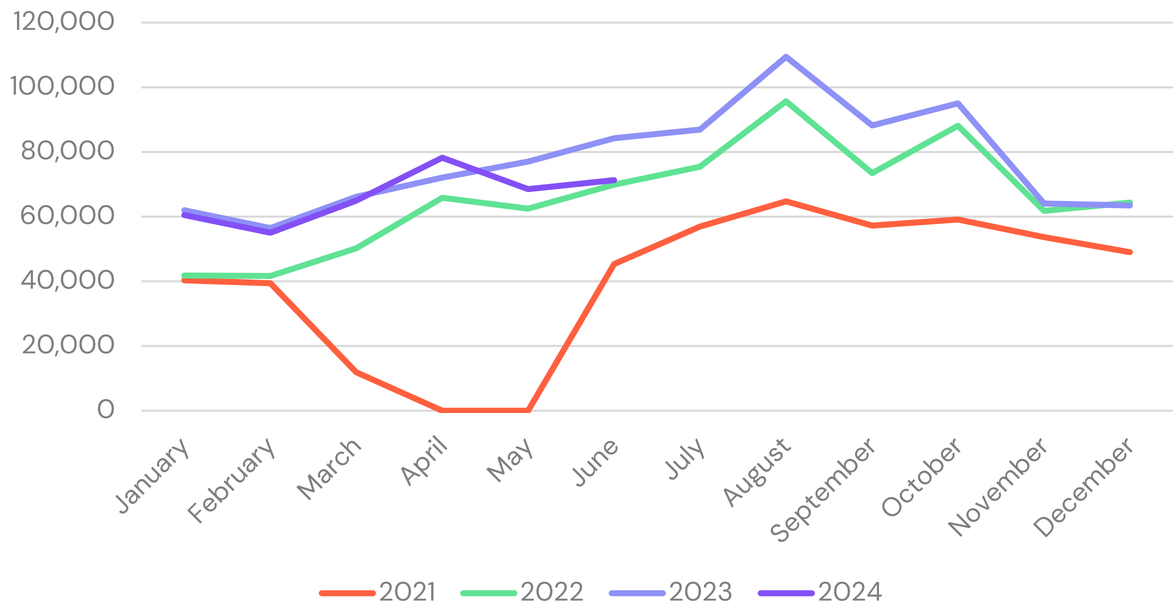
Gaming Premises – Casinos: Players' Visits

Table 6: Gaming Premises - Casinos - Players' Visits

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total	137,015	340,761	331,844	458,798	417,979	507,109	**398,474**

The total number of visits to local casinos during the first half of 2024 stood at 398,474, a decrease of 4.7% when compared to the corresponding period in 2023, with the major decreases being observed in the shoulder months of May and June 2024, as presented in Chart 3. This drop follows an abnormal high number of visits which were recorded in April 2024, the highest recorded for the month in the last three years.

Chart 3: Gaming Premises - Casinos - Players' Visits



Junket Players

During the period under review, local casinos hosted 554 junket players. Of all junket players hosted by casinos during the period under review, 39.7% referred to in-house junkets, whilst the remaining players were brought to the casinos by junket leaders.

Table 7: Gaming Premises - Casinos - Number of Junket Players

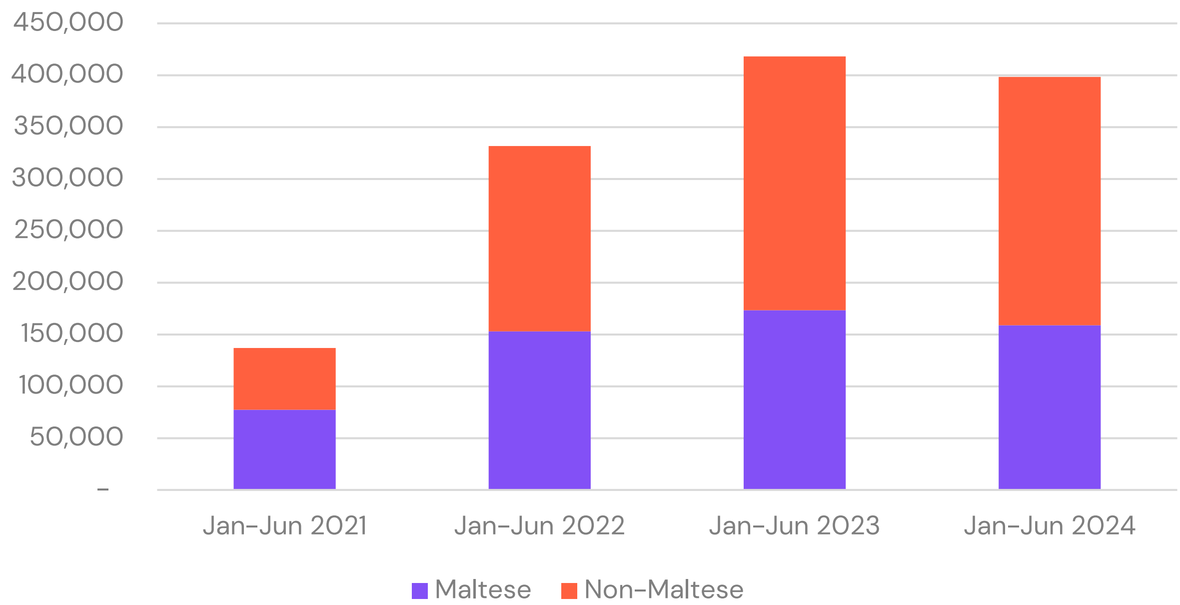
	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
In-house	98	92	226	203	319	355	**220**
With junket leader	156	363	427	490	455	359	**334**
Total	254	455	653	693	774	714	**554**

Gaming Premises – Casinos: Players' Profile

Nationality

During the first six months of 2024, the number of visits by Maltese players decreased by 8.4%, while that of non-Maltese players decreased by 2.1% when compared to the corresponding period of 2023. Visits by non-Maltese players accounted for 60.2% of all casino visits registered in 2024. The predominance of foreign players has once again been reflected in this reporting period, affirming the tourism industry's significant role in the casino market.

Chart 4: Gaming Premises - Casinos - Players' Profile by Nationality

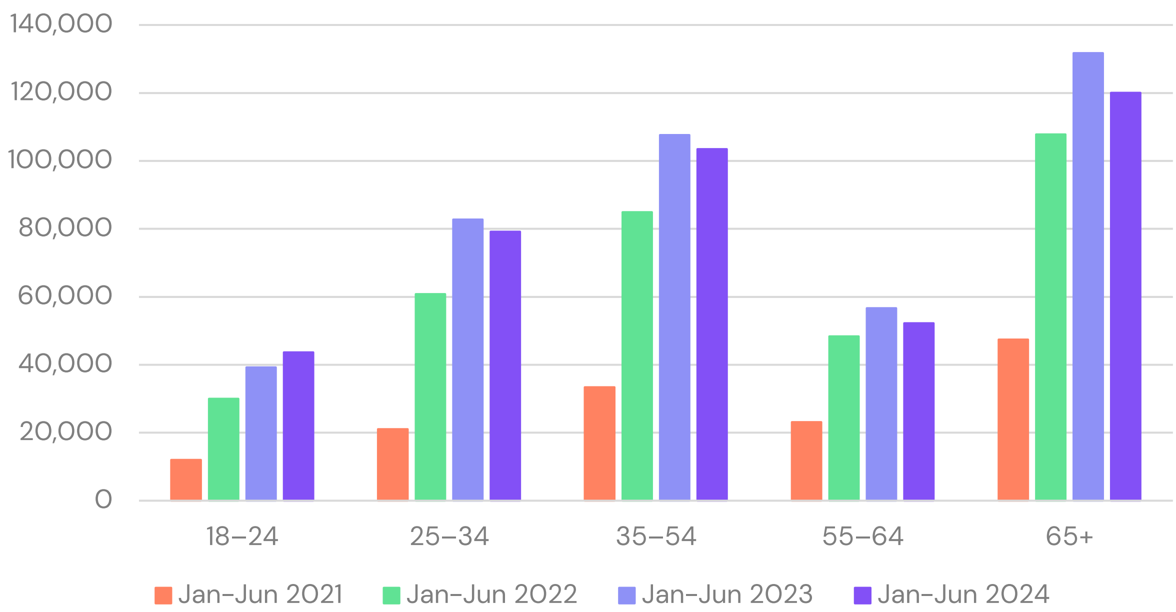


Demographic Group

Visits by players falling within the majority of age groups decreased in line with the overall decrease in the number of visits. An interesting observation is that visits by persons aged 18-24 increased by 11.3% when compared to the same reporting period of last year (2023). This increase reflects Malta's growing cosmopolitan status among people in this age group. Nonetheless, the 18-24 age group remains the smallest demographic category visiting Malta's casinos.

Visits by persons aged 65 and over continued to constitute the largest demographic category of visitors to casinos, accounting for 30.1% of the total visits. Visitors from the 35–54 age bracket constituted 26.0% of the visits, with this being the second largest category. Visits by players from the 25–34, 55-64 and 18-24 age brackets accounted for 19.9%, 13.1%, and 11.0% of the total visits, respectively.

Chart 5: Gaming Premises - Casinos - Players' Profile by Age Group Distribution



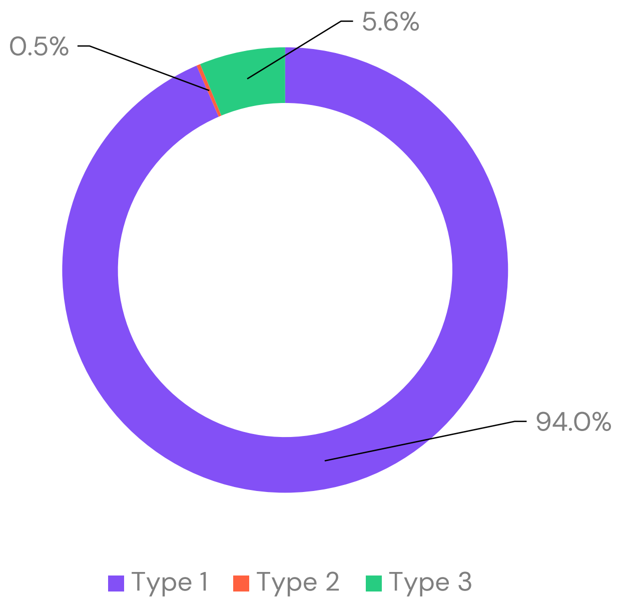
Note: The legal age to enter casinos in Malta is 25 for Maltese and 18 for non-Maltese players.

It is worth noting that visits by female players accounted for 34.9% of all visits, in line with the share observed during the same reporting period of 2023.

Gaming Premises – Casinos: Gaming Revenue

Casino gaming revenue increased by 5% in the first half of 2024 compared to the same period of 2023. This reflected an increase average spend per visit, as the number of visitors was actually lower during the period. Almost the entire GR was generated from Type 1 games, as shown in Chart 6.

Chart 6: Gaming Premises - Casinos – GR Distribution by Game Type



Note: The total percentage does not add up to 100% due to rounding of figures.

The GR from the limited junket activity stood at 10.7% of the total GR reported in the first six months of 2024, in line with that reported during January and June 2023.

Average Gaming Revenue per Visit

The average GR per visit stood at €72.2 in the first half of 2024, a significant increase of 10.1% compared to that of the same period in 2023. This was the highest average spend per visit ever recorded in the casino sector.

Table 8: Gaming Premises - Casinos - Average GR per Visit

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total [€]	67.5	62.2	67.6	60.9	65.6	59.3	**72.2**

Gaming Premises – Casinos: Compliance Contribution

The MGA collected almost €9.6 million by way of compliance contribution, licence fees, levies, and a 5% consumption tax on customers located in Malta during the first half of 2024. This to an extent reflected the growth in revenue.

Table 9: Gaming Premises - Casinos - Compliance Contribution

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total [€]	2,663,299	7,920,131	7,316,096	9,376,841	8,953,364	10,044,499	**9,570,884**

Note: The above figures include the compliance contribution fee, licence fees, and a 5% consumption tax on customers located in Malta in line with the Gaming Tax Regulations (S.L. 583.10).

Gaming Premises – Casinos: Employment

At the end of June 2024, the total number of FTE direct employees working in casino establishments stood at 586, an increase of over 3.5% when compared with the figure reported at the end of 2023.

Table 10: Gaming Premises - Casinos - Employment (FTE)

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Total	506	496	494	533	531	565	**586**

The proportion of male employees remained unchanged at 60.4% at the end of June 2024. Furthermore, the share of non-Maltese employees increased by 2.9 percentage points to 72.8%, in comparison to the same period in 2023.

Gaming Premises – Controlled Gaming Premises

Gaming Premises – Controlled Gaming Premises: Number of Outlets

There were 21 premises offering controlled gaming across Malta by June 2024. This followed a period of restructuring in the sector and in business models during 2022 and 2023, bringing the total number of premises down from 64 in 2021, as shown in Table 11. The highest number of outlets are located in the Northern Harbour and the Southern Harbour regions of Malta, as specified in Appendix 1, with eight and six approved gaming premises, respectively. These two regions feature a relatively high population value and density, and significant commercial activity that is also of a touristic nature.

There are no specific limits on controlled gaming premises per locality. However, the Authority ensures that approvals of licences and premises are consistent with safeguarding and protecting minors and the general public. Table 11 presents the total number of gaming premises for all the licensed operators.

Table 11: Controlled Gaming Premises - Number of Outlets

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Total	64	64	63	28	29	21	**21**

Gaming Premises – Controlled Gaming Premises: Game Types

By the end of June 2024, the five authorised licensees operating the controlled gaming premises had approval to offer Type 1 games and four operators had approval for Type 2 games. In addition, one of the operators had an approval to offer Type 3 games. Each game type is subdivided into verticals, as presented in Table 12[9].

Table 12: Controlled Gaming Premises – Game Types Verticals

Type 1	**5**
Casino including Live Casino Setup	5
Type 2	**4**
Fixed Odd Betting, including Live Betting	4
Type 3	**1**
Peer-to-Peer Bingo/Poker	1
Type 4	**0**
Games of Skill	0

Gaming Premises – Controlled Gaming Premises: Number of Gaming Devices

The number of licensed gaming devices amounted to 162 at the end of June 2024. This brought the average number of gaming devices per outlet to 7.7, which is in line with the regulations, limiting the number of devices per outlet to no more than 10.

Table 13: Controlled Gaming Premises - Average Number of Gaming Devices

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Total	8.5	8.4	8.6	8.4	7.5	7.7	**7.7**

[9] The table shows an abridged list of the gaming verticals, showing only those that are being used. For a full list of the gaming verticals, please refer to Point 5 of the Methodology.

Gaming Premises – Controlled Gaming Premises: Players' Visits

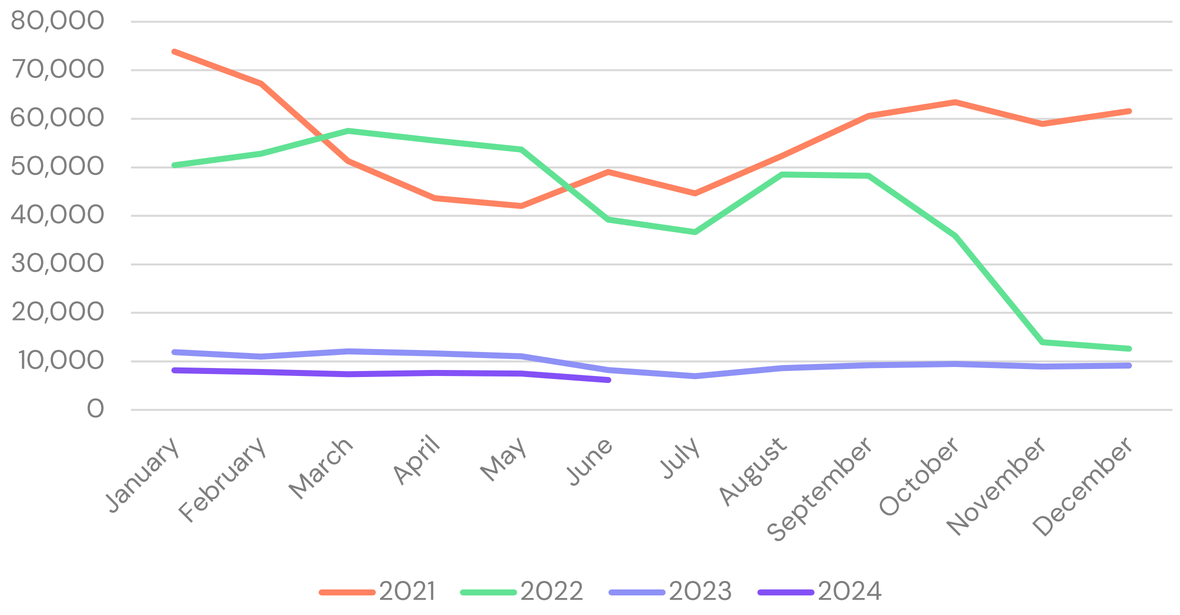
During the first six months of 2024, the number of visits to controlled gaming premises stood at 44,631, a decrease of 32.2% when compared with that reported in the corresponding period of 2023, reflecting the sector-wide restructuring.

Table 14: Controlled Gaming Premises - Number of Visits

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total	327,166	341,537	309,181	195,832	65,857	52,361	**44,631**

Chart 7 presents the monthly visits registered in the gaming parlour sector between 2021 and 2024. Although it is not possible to make any comparisons because of the significant change in the characteristics of this sub-market since the beginning of 2023, one can observe that the monthly activity reported between January and June 2024 follows a similar monthly trend to what was reported during the same months in 2023.

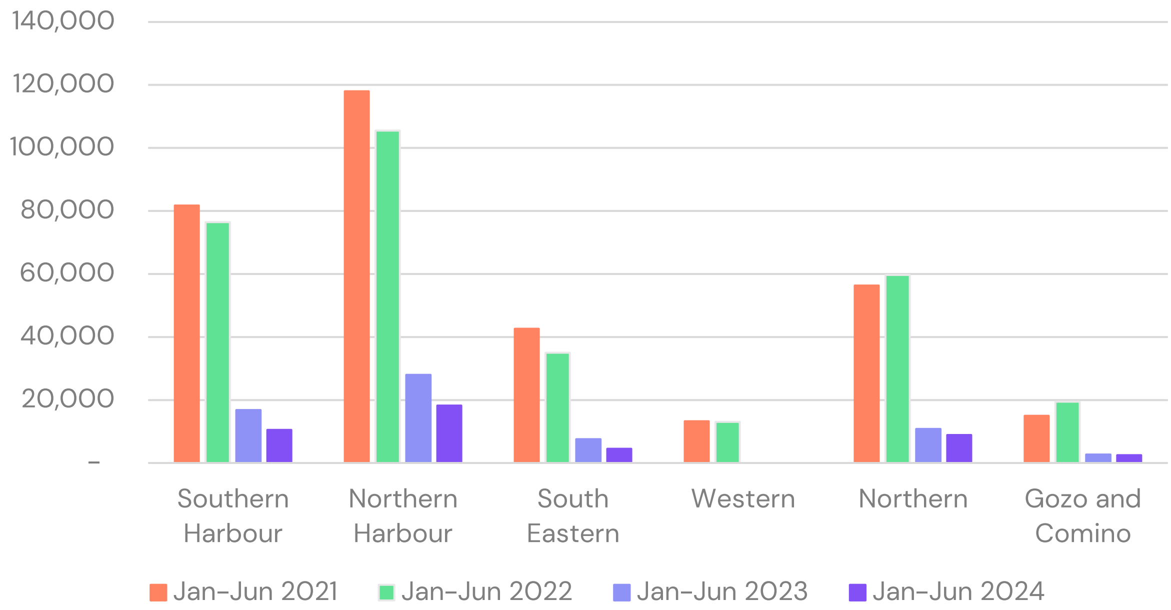
Chart 7: Controlled Gaming Premises - Number of Visits



Number of Visits by Locality

Although smaller in volume, similar to the trends observed in the previous years, the highest number of player visits occurred in the Northern Harbour and Southern Harbour districts, accounting for 40.8% and 23.6% of all visits, respectively. These two districts are also characterised by the highest number of outlets, eight and six respectively, which explains the concentration levels of visits. The remaining visits were distributed between the remaining districts, that is, Northern (19.9%), South Eastern (10.1%) and Gozo and Comino (5.6%). It is to be noted that, since the first half of 2023, within the Western District, there are no longer any authorised gaming establishments operating controlled gaming.

Chart 8: Controlled Gaming Premises - Number of Visits by District



Gaming Premises – Controlled Gaming Premises: New Players' Registrations

1,155 new registrations were recorded at the controlled gaming premises during the first six months of 2024. This marks a decrease of 22.6% compared to the same reporting period in 2023, in line with earlier observations.

Table 15: Controlled Gaming Premises - New Players' Registrations

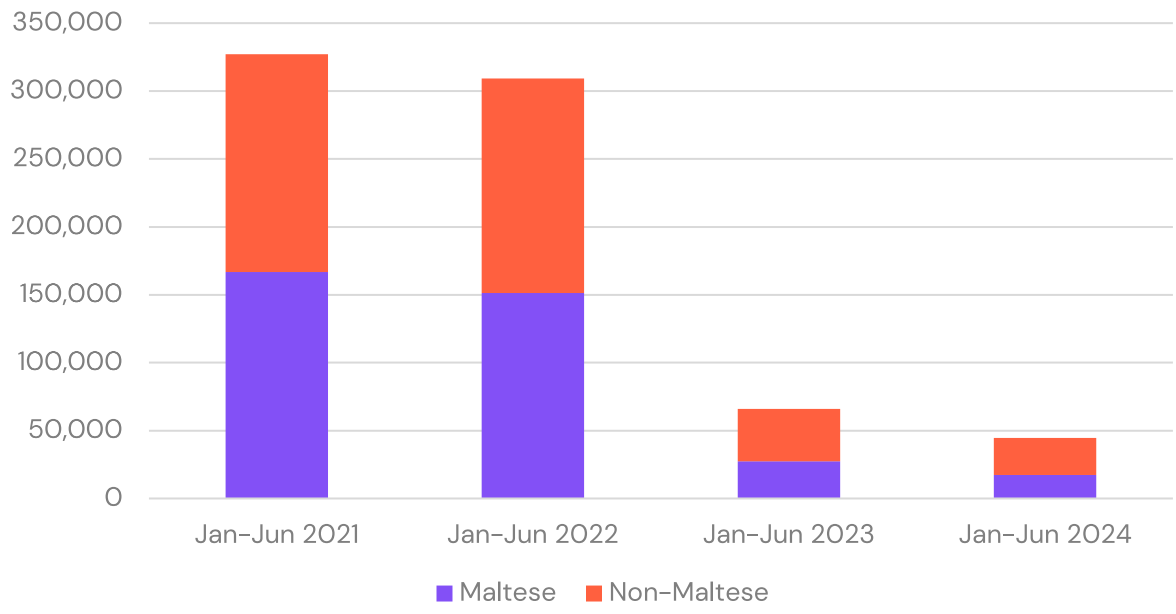
	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total	3,085	3,781	3,623	4,167	1,492	1,893	**1,155**

Gaming Premises – Controlled Gaming Premises: Players' Profile

Nationality

The share of visits to gaming parlours by Maltese players continued to decline and stood at 38.4% during the first half of 2024, resulting in an overall drop of 3 percentage points from the level recorded during the same reporting period in 2023. This trend continues to reflect the changing demographic composition of the resident population in Malta.

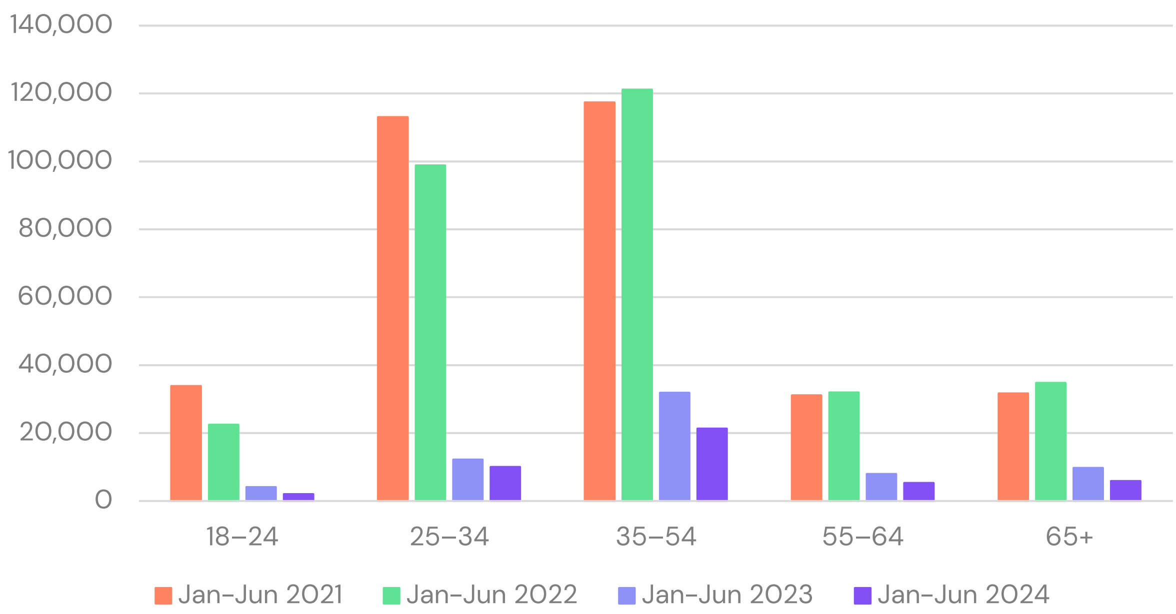
Chart 9: Controlled Gaming Premises - Players' Profile by Nationality



Demographic Group

Visits by players from the 35-54 and 25-34 age brackets continued to constitute the largest demographic category of visitors to gaming premises, accounting for 47.8% and 22.5% of all visits, respectively. Visits by players from the 65+, 55-64 and 18-24 age brackets accounted for 13.1%, 12.0% and 4.5% of the total visits registered during 2023, respectively.

Chart 10: Controlled Gaming Premises - Players' Profile by Age Group Distribution

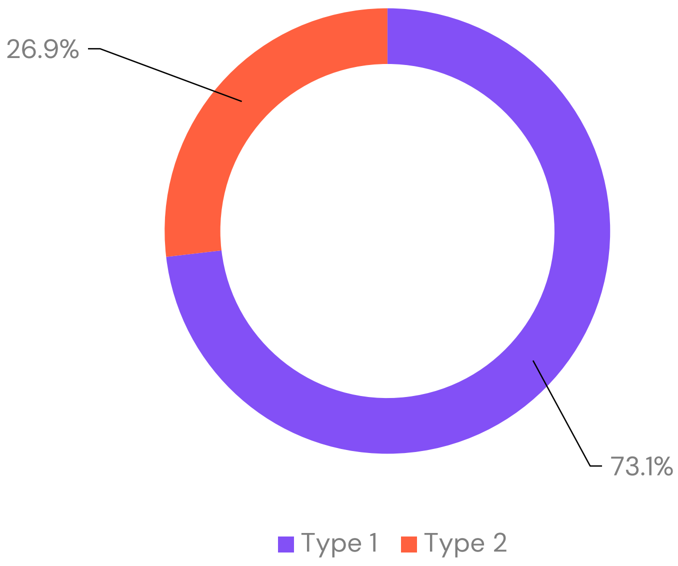


Furthermore, controlled gaming premises are most popular with males, whose visits accounted for 81.0% of the total visits registered during the first half of 2024.

Gaming Premises – Controlled Gaming Premises: Gaming Revenue

The GR generated by controlled gaming premises reported a significant decrease of 40.6% when compared to the first six months of 2023. This is in line with the reported lower number of visits. Out of the total GR generated during the first six months of 2024, 73.1% was generated from Type 1 games and 26.9% from Type 2 games.

Chart 11: Controlled Gaming Premises - GR Distribution by Game Type



Average Gaming Revenue per Visit

The average GR per visit to controlled gaming premises stood at €23.0, which is in line with the average reported for 2023.

Table 16: Controlled Gaming Premises - Average GR per Visit

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total [€]	12.2	15.9	20.2	20.5	26.2	21.4	**23.0**

Gaming Premises – Controlled Gaming Premises: Compliance Contribution

The MGA collected a total of €336,099 from the operators of controlled gaming premises.

Table 17: Controlled Gaming Premises - Compliance Contribution

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total [€]	987,764	1,388,067	1,518,860	1,007,490	510,053	382,830	**336,099**

Note: The above figures include the compliance contribution fee, licence fees, and a 5% consumption tax on customers located in Malta in line with the Gaming Tax Regulations (S.L. 583.10).

Gaming Premises – Controlled Gaming Premises: Employment

By the end of June 2024, the number of FTE direct employees working in the controlled gaming premises amounted to 62, at par with the figure reported at the end of 2023.

Table 18: Controlled Gaming Premises - Employment (FTE)

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Total	169	177	168	83	83	61	**62**

By the end of June 2024, the demographic distribution of employees at controlled gaming parlours remained largely unchanged with almost 60% of employees being male, and around 63% being non-Maltese.

Gaming Premises – Commercial Bingo

Gaming Premises – Commercial Bingo: Number of Establishments

Between January and June 2024, two commercial bingo halls, one located in Qawra and the other in Paola, were authorised to operate under an MGA licence. The hall in Qawra was only operational during the first quarter of 2024. It should be noted that during 2023, two commercial bingo halls, namely the ones in B'Kara and Valletta, stopped their bingo operations.

Gaming Premises – Commercial Bingo: Game Types

At the end of June 2024, both commercial bingo licensees were approved to offer peer-to-peer bingo/poker under Type 3 games[10].

Gaming Premises – Commercial Bingo: New Players' Registrations

Given that one of the two bingo halls was not operational during the second quarter of 2024, there was a decrease in the number of new registrations in commercial bingo halls, with new player registrations totalling 555 by the end of June 2024.

Table 19: Gaming Premises - Commercial Bingo - New Players' Registrations

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total	150	497	434	798	924	933	**555**

[10] For more information on the game types, please refer to Point 5 of the Methodology.

Gaming Premises – Commercial Bingo: Players' Visits

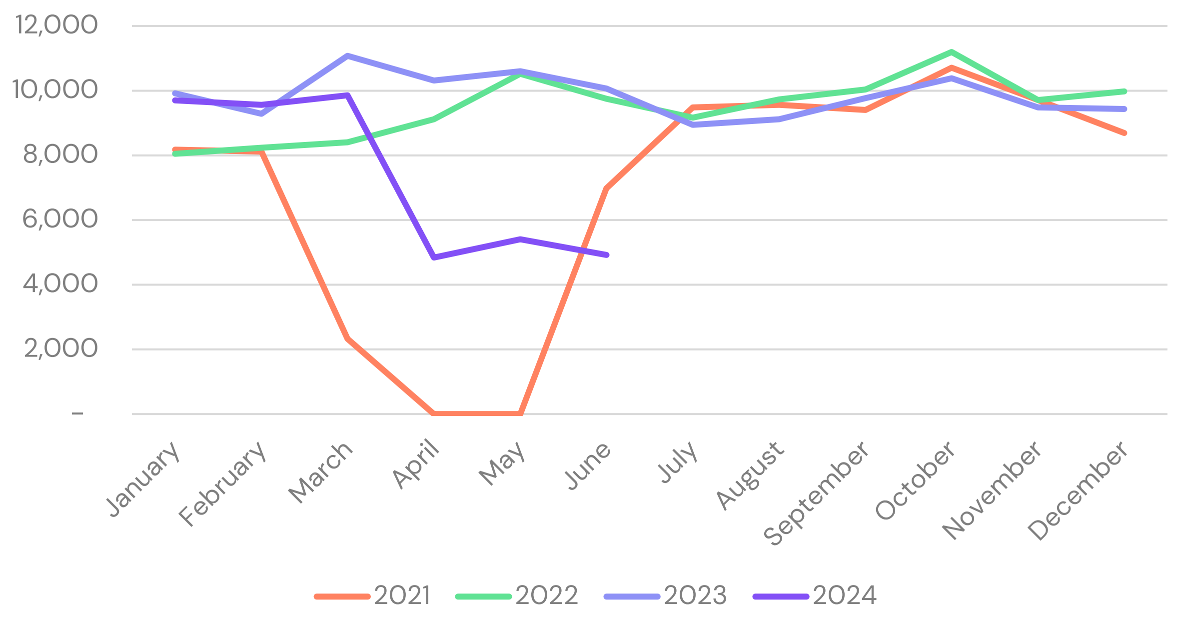
When compared to the same reporting period in 2023, the number of players' visits to commercial bingo halls decreased by 27.7%, reflecting the cessation of operations of two establishments and the temporary suspension of another in the second quarter of 2024.

Table 20: Gaming Premises - Commercial Bingo - Number of Visits

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total	25,597	57,563	54,071	59,828	61,264	57,118	**44,294**

For a better comparison, Chart 12 presents the number of monthly visits registered in the commercial bingo sector between 2021 and 2024. It can be observed that until March 2024, that is, up to the month when both bingo halls were operational, the number of visits was comparable to what was reported monthly since 2022.

Chart 12: Gaming Premises - Commercial Bingo - Number of Visits

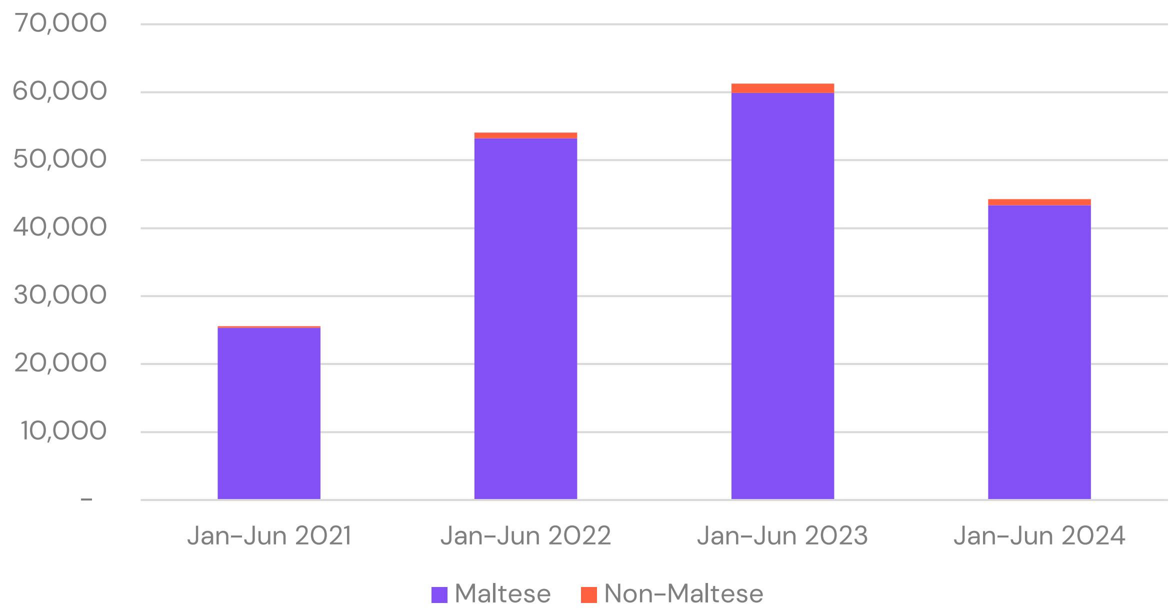


Gaming Premises – Commercial Bingo: Players' Profile

Nationality

Visits to commercial bingo halls were predominantly made by Maltese residents, constituting 98.0% of the total visits reported. This is in line with the trends observed in previous reporting periods.

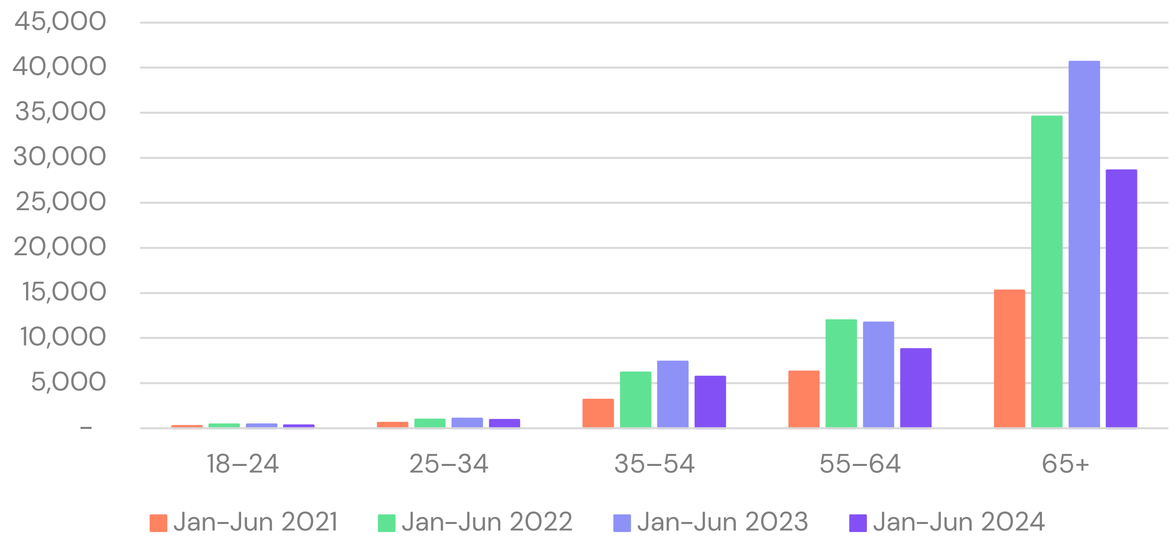
Chart 13: Gaming Premises - Commercial Bingo - Players' Profile by Nationality



Demographic Group

Visits by players aged 65 years or over continued to represent the highest share (64.5%) of the total visits registered by the commercial bingo sector. Visits by players from the 18–24, 25–34, 35–54 and 55–64 age brackets accounted for 0.7%, 2.0%, 12.9% and 19.8% of total visits registered in the first six months of 2024, respectively.

Chart 14: Gaming Premises - Commercial Bingo - Players' Profile by Age Group Distribution



Similar to what was recorded in previous reporting periods, most players who visited commercial bingo halls during the first half of 2024 were women, accounting for 89.8% of all the visits made.

Gaming Premises – Commercial Bingo: Gaming Revenue

The first six months of 2024 brought about a decrease in the total GR, going down by 9.8% when compared to the same reporting period of the previous year. This is attributed to the decrease in player visits, which was significantly contrasted by an increase in the average revenue per visit.

Average Gaming Revenue per Visit

The average GR per visit as at the end of June 2024 stood at €20.2, an increase of 24.7% from the figure reported at the end of June 2023.

Table 21: Gaming Premises - Commercial Bingo - Average GR per Visit

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total [€]	17.9	13.7	15.8	15.1	16.2	15.8	**20.2**

Gaming Premises – Commercial Bingo: Compliance Contribution

The MGA collected a total of €160,123 by way of fees and taxes owed by the commercial bingo hall operators in terms of the applicable legislation.

Table 22: Gaming Premises - Commercial Bingo - Compliance Contribution

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total [€]	77,826	171,958	162,430	188,640	129,648	148,553	**160,123**

Note: The above figures include the compliance contribution fee, licence fees, and a 5% consumption tax on customers located in Malta in line with the Gaming Tax Regulations (S.L. 583.10).

Gaming Premises – Commercial Bingo: Employment

By the end of June 2024, the commercial bingo sector directly employed 18 FTE employees.

Table 23: Gaming Premises - Commercial Bingo - Employment (FTE)

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Total	33	33	31	29	23	25	**18**

At the end of June 2024, commercial bingo hall employees remained predominately female, standing at 80.0%, and the ratio of non-Maltese employees continued to increase, reaching 65.0% as at the end of June 2024.

National Lottery

National Lottery plc started its operations on 5 July 2022. The data presented in this section initiates from the second half of 2022 since differences in the overall suite of products and distribution network make the overall operation not comparable to the operation which existed before this period.

National Lottery: Number of Outlets

At the end of June 2024, the total number of National Lottery Outlets (NLOs) across Malta and Gozo stood at 238.

Table 24: National Lottery – Outlets

	2022	2023		2024
	end-Dec	end-Jun	end-Dec	**end-Jun**
Total	198	221	246	**238**

National Lottery: Game Types

As at the end of the first six months of 2024, National Lottery was in possession of an approval to offer Type 1, Type 2 and Type 3[11] games. Each game type is subdivided into verticals, as presented in Table 25[12].

Table 25: National Lottery – Game Types Verticals

Type 1	1
Lotteries	1
Type 2	1
Fixed Odd Betting, including Live Betting	1

[11] For more information on the game types, please refer to Point 5 of the Methodology.

[12] The table shows an abridged list of the gaming verticals, showing only those that are being used. For a full list of the gaming verticals, please refer to Point 5 of the Methodology.

Type 3	1
Pool Betting, including Betting Exchange	1
Type 4	0
Games of Skill	0

National Lottery: Number of Gaming Devices

As at the end of June 2024, the total number of gaming devices at NLOs stood at 584, including 251 sports-betting terminals and 333 electronic gaming machines.

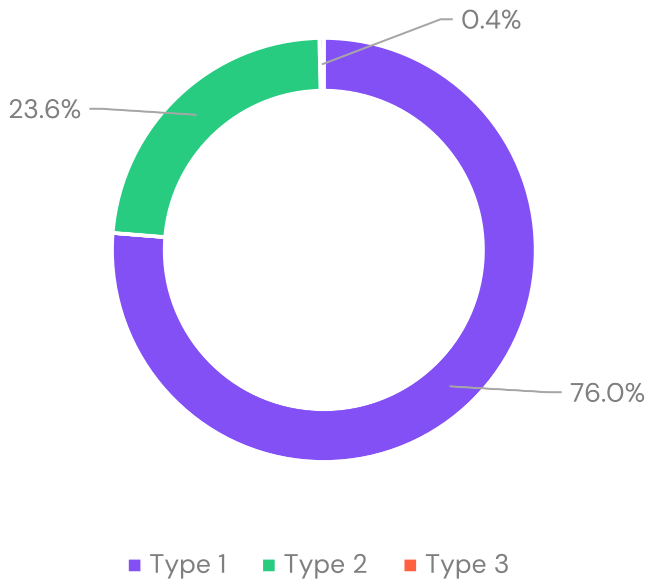
Table 26: National Lottery - Number of Gaming Devices

	2022	2023		2024
	end-Dec	end-Jun	end-Dec	**end-Jun**
Sports Betting Terminals	211	301	257	**251**
Electronic Gaming Machines	247	278	323	**333**
Total	458	579	580	**584**

National Lottery: Gaming Revenue

Of the total GR generated during the first six months of 2024, 76.0% was generated from Type 1 games, including Lottery and Casino-Type games. A further 23.6% was generated from Type 2 games, mainly constituting sports betting games, whereas the remaining 0.4% was generated from Type 3 games, primarily constituting Pool Betting, including Betting Exchange.

Chart 15: National Lottery - GR by Game Type



Source: National Lottery plc

National Lottery: Taxation

In the first half of 2024, the MGA collected almost €9.3 million by way of fees and taxes owed by the National Lottery operator in terms of the applicable legislation.

Table 27: National Lottery - Compliance Contribution

	2022	2023		2024
	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total [€]	6,725,783	8,260,453	9,361,902.23	**9,257,893**

Note: The above figures include the compliance contribution fee, licence fees, and a 5% consumption tax on customers located in Malta in line with the Gaming Tax Regulations (S.L. 583.10).

Contribution to the Social Causes Fund

In addition to gaming tax, in accordance with the law as well as the concession conditions, National Lottery plc also contributes to the Social Causes Fund. During the first half of 2024, the contribution amounted to €254,124.97

Table 28: National Lottery – Contribution to the Social Causes Fund

	2022	2023		2024
	end-Dec	end-Jun	end-Dec	**end-Jun**
Total [€]	237,334.73[13]	276,414.01	460,137.36	**254,124.97**

National Lottery: Employment

As of the end of June 2024, the total number of FTE direct employees working at National Lottery plc stood at 239.

Table 29: National Lottery - Employment (FTE)

	2022	2023		2024
	end-Dec	end-Jun	end-Dec	**end-Jun**
Total	235	229	234	**239**

At the end of June 2024, the distribution of employees remained practically unchanged with the proportion of male employees accounting for 66.5%, which is also predominantly (87.5%) Maltese.

[13] This figure excludes any contributions made by the previous National Lottery operator, whose licence was terminated on the 3 July 2022.

Land-Based Gaming: Self-Exclusion

The legislative framework enables individuals to voluntarily exclude themselves from gambling activities for a period of time. Players who avail themselves of the self-exclusion programme will be refused services in land-based casinos, commercial bingo halls, or controlled gaming premises for the duration of the self-exclusion period. Those players who opt to exclude themselves for a definite period, either six months or a full year, can re-engage in gambling activities after the predetermined time has elapsed. In those circumstances where a player is defined to be a pathological gambler, the player will be self-excluded for an indefinite period of time.

Number of Self-Exclusions Requests

Between January and June 2024, a total of 857 players requested to be excluded from land-based outlets in Malta, an increase of 4.1% when compared to the figures for the same period in 2023. This can be attributed to the efforts being made on the responsible gambling front and the rolling sum of the number of people who opt for a 12-month exclusion, which is automatically renewed. During the period under review, 37.9% of the players opted for a six-month exclusion, whilst 62.1% of players applied for a 12-month exclusion.

Table 30: Land-Based - Number of Self-Exclusion Requests

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
6 months	187	322	344	315	360	286	**325**
12 months	307	431	422	449	463	487	**532**
Total	494	753	766	764	823	773	**857**

The age distribution of self-excluded players remained consistent with previous years. Most requests came from the 35-54 age group, making up 36.6% of total requests, while the fewest requests came from the 18-24 age group, accounting for 3.7% of the requests. The remaining requests were distributed between the 25-34, 55-64 and 65+ age groups, contributing 23.3%, 16.5% and 19.8% respectively. In line with the trends observed in previous years, most players requesting a self-exclusion were male, representing 76.4% of the total requests.

Other Land-Based Games

Low-Risk Games

The regulatory framework classifies non-profit games, commercial communication games, and limited commercial communication games as low-risk games, as per the Fifth Schedule of the Gaming Authorisations Regulations, 2018. Low-risk games require a permit valid only for a singular event which expires when the event is concluded.

Non-Profit Games

A non-profit game is a licensable game wherein the stake cannot exceed €5 per player, and over 90% of the net proceeds are forwarded to an entity with a charitable, sporting, religious, philanthropic, cultural, educational, social, or civic purpose.

Table 31: Non-Profit Games - Permits Issued

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Non-profit lottery	6	10	6	12	3	17	**7**
Non-profit tombola	126	617	567	841	773	887	**858**

Following the COVID-19 pandemic the number of permits granted for non-profit games started to increase to the levels recorded in previous years to the pandemic, since gaming activity started to gain momentum. The increasing numbers of permits observed in 2023 and 2024 can be attributed to the MGA efforts to facilitate the application process as well as increased public awareness of the requirements to obtain a permit to organise these activities.

Commercial Communication Games

Commercial Communication games are organised to encourage or promote the selling of products or services. Any payments required to be made by the participant serve only to acquire the promoted goods or services and not to participate in the game. However, there might be a condition when in order to participate in the game, the person is required to purchase the promoted goods or services. These games are also subject to restrictions, including that the prizes offered cannot exceed €100,000 in any calendar month or €500,000 during any calendar year. Between January and June 2024, we issued 45 certificates for commercial communication games.

Limited Commercial Communications Games

A limited commercial communication game is a game that includes a stake and a prize. For a game to qualify as a limited commercial communication game, the value of the stake cannot exceed €2 per player. We have not received any permit applications for such games yet.

Detailed Statistical Report on the Online Gaming Activities

Online Gaming: Number of Companies

At the end of June 2024, the number of gaming companies holding a valid active licence to offer a gaming service stood at 303, as shown in Table 32.

In 2018, the concept of a corporate group licence was introduced in the Gaming Act, allowing multiple companies to be covered by one group licence. Entities falling under a corporate licence are jointly considered to be one licensed entity, and for the purpose of these statistics, they are considered as one operating company. At the end of June 2024, 49 online companies held corporate group licences, with 149 entities forming part of the respective groups.

Table 32: Online Gaming - Number of Companies

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
No. of companies (*Note 3*)	319	332	346	338	325	305	**303**
Additional companies falling under the Corporate Group Licence	158	165	169	134	141	148	**149**

Note 3: The reported number of companies relates to the figures as of the end of June and December respectively. These figures refer solely to MGA-licensed entities and include the active licences base, that is, those entities that have a valid licence to offer a gaming service. Figures as of 2022 are not comparable to previous reporting periods due to a change in the definition of what constitutes an active company, which as of 2022, includes those that are active, voluntarily suspended or suspended.

Online Gaming: Distribution of Licences by Category

Operators can offer multiple games under the same licence under the current framework. Multiple licences are only required if they intend to offer both B2C and B2B services. At the end of June 2024, the B2B group of licences accounted for 52.2% of the total licence base. Since the end of 2023, a trend change has been noted, whereby the jurisdictional business model under the Maltese gaming licence is progressively evolving towards a lower risk stance while building on a more diversified skills base consistent with B2B activities. This was one of the principal aims of the reform in the regulatory regime effected in 2018.

At the end of June 2024, 49 corporate group licences were active, of which 26 referred to B2C-related operations whilst the remaining 23 were for B2B-related activity.

Table 33: Online Gaming - Distribution of Licences by Category

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
B2C – Gaming Service Licence *(Note 4)*	192	197	199	187	175	155	**149**
of which are the B2C – Corporate Licences	27	27	28	29	28	27	**26**
B2B – Critical Supply Licence *(Note 4)*	135	144	154	160	159	159	**163**
of which are the B2B – Corporate Licences	12	13	15	15	21	21	**23**

Note 4: The reported number of licences relates to figures as of the end of June and December respectively. These figures refer solely to MGA-licensed entities and include the active licences base, that is, those entities that have a valid licence to offer a gaming service. Figures as of 2022 are not comparable to previous reporting periods due to a change in the definition of what constitutes an active company, which now includes those that are active, voluntarily suspended or suspended.

Online Gaming: Distribution of B2C Licences by Game Type

According to the present licensing regime, licensees can offer four different game types[14]. An operator can offer one or multiple game types. In line with previous periods, at the end of June 2024, most active B2C operators possessed an approval to offer Type 1 and Type 2 games, as presented in Table 34.

Table 34: Online Gaming - B2C - Game Types

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Type 1	183	167	164	155	148	136	**128**
Type 2	125	125	125	117	108	95	**93**
Type 3	51	47	46	44	42	38	**40**
Type 4	14	13	14	13	12	9	**8**

[14] For more information on the game types, please refer to Point 5 of the Methodology.

Online Gaming: Distribution of B2B Licences by Game Type

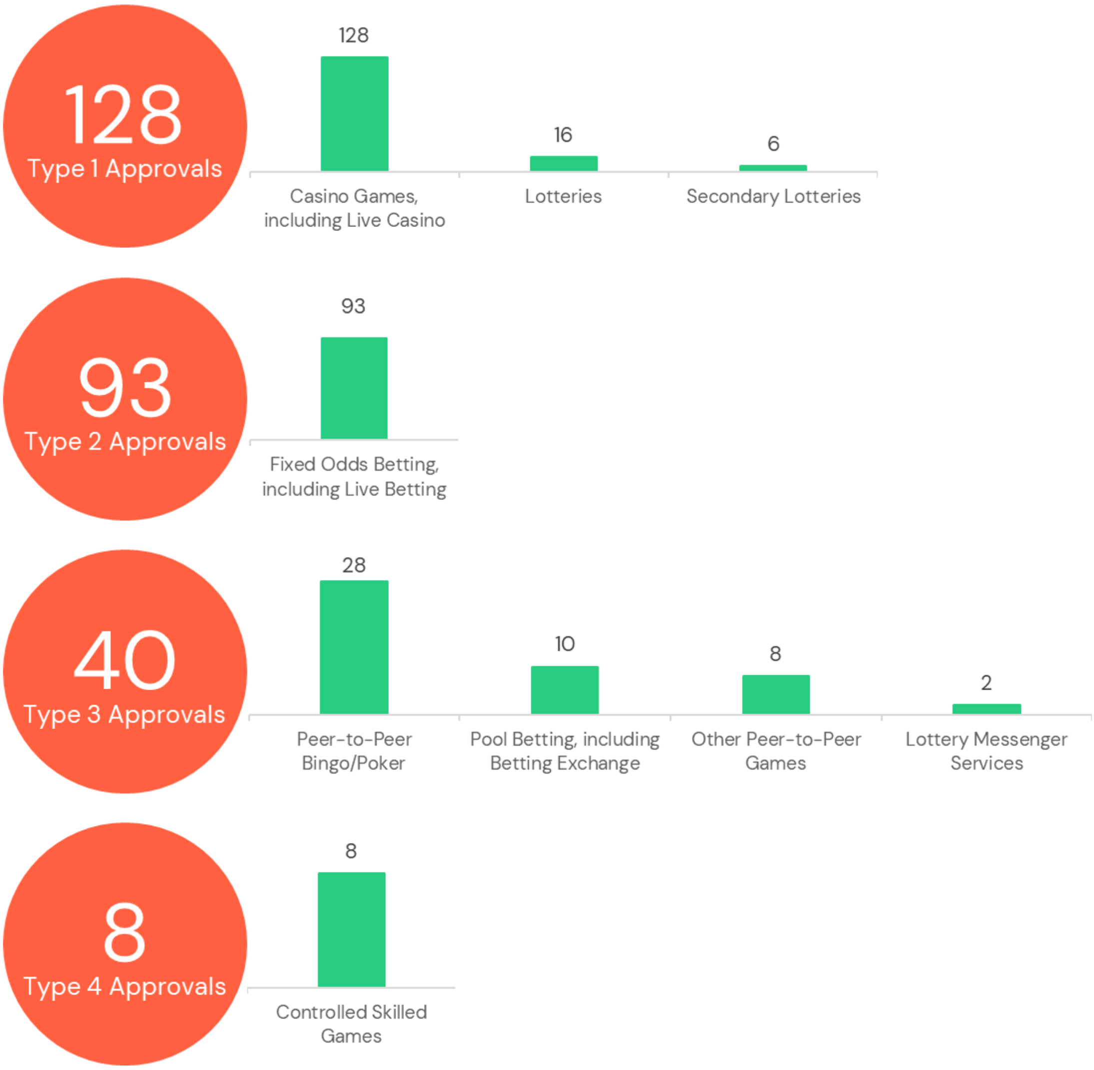
As shown in Table 35, most online B2B licences hold approval to offer services relating to Type 1 games, as in previous reporting periods.

Table 35: Online Gaming - B2B - Game Types

	2021		2022		2023		2024
	end-Jun	end-Dec	end-Jun	end-Dec	end-Jun	end-Dec	**end-Jun**
Type 1	129	116	134	138	138	138	**142**
Type 2	37	36	32	44	42	43	**43**
Type 3	20	20	20	20	20	21	**21**
Type 4	5	5	5	4	4	4	**4**

Online Gaming: Distribution of B2C Licences by Game Type and Vertical

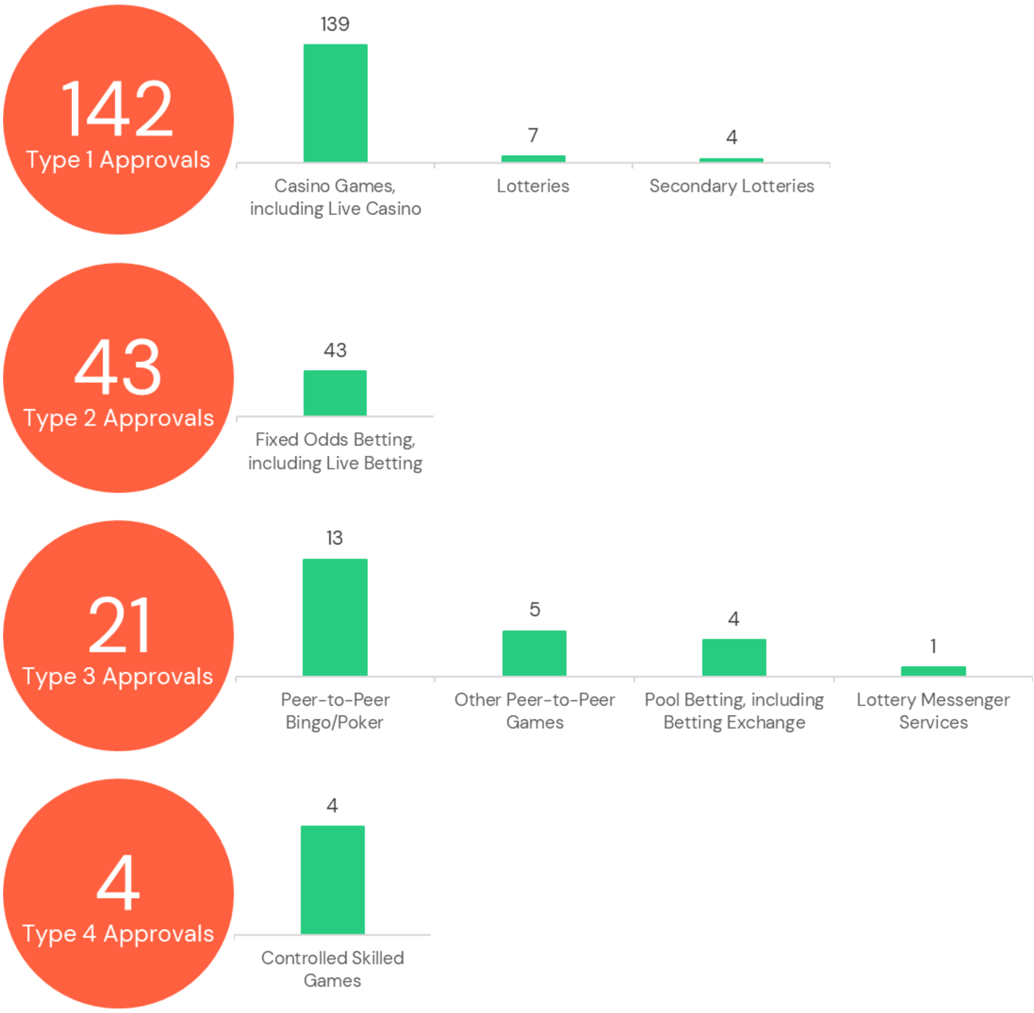
The following chart indicates the game-type approvals and verticals held by the B2C licensees as at the end of June 2024. A licensee may have approval to offer services of more than one vertical within a game type. The number of verticals reported under each type does not represent a share of the total type approvals but rather the frequency of the vertical that falls under that type.



Note 5: The numbers shown for each vertical reflect the frequency of verticals associated with the type approvals, not their proportion within the total type approvals. A single type approval can encompass multiple vertical approvals, leading to overlapping counts across verticals.

Online Gaming: Distribution of B2B Licences by Game Type and Vertical

The following chart indicates the game-type approvals and verticals held by the B2B licensees at the end of June 2024. A licensee may be approved to offer services of more than one vertical within a game type. The number of verticals reported under each type does not represent a share of the total type approvals but rather the frequency of the vertical that falls under that type.



Note 6: The numbers shown for each vertical reflect the frequency of verticals associated with the type approvals, not their proportion within the total type approvals. A single type approval can encompass multiple vertical approvals, leading to overlapping counts across verticals.

Online Gaming: Customer Accounts

Active Player Accounts

The number of active player accounts[15] registered on websites licensed by the MGA increased by 13.8% when compared to the corresponding period of 2023, reaching 20.6 million accounts. This increase is attributed to successful business growth in a dynamic industry, which could also reflect developments of an idiosyncratic and transient nature.

Table 36: Online Gaming - Active Player Accounts

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total	17,738,298	17,721,199	19,275,887	17,112,719	18,078,260	18,913,509	**20,564,058**

New Active Player Accounts

The estimated number of new active payer accounts stood at 8.8 million, corresponding to a 3.8% decrease compared to the same period in 2023.

Table 37: Online Gaming - New Active Player Accounts

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total	8,621,937	7,876,693	8,889,281	9,206,699	9,199,625	8,215,346	**8,846,481**

On the other hand, the number of new registrations experienced an increase of 5.9% when compared to the first half of 2023.

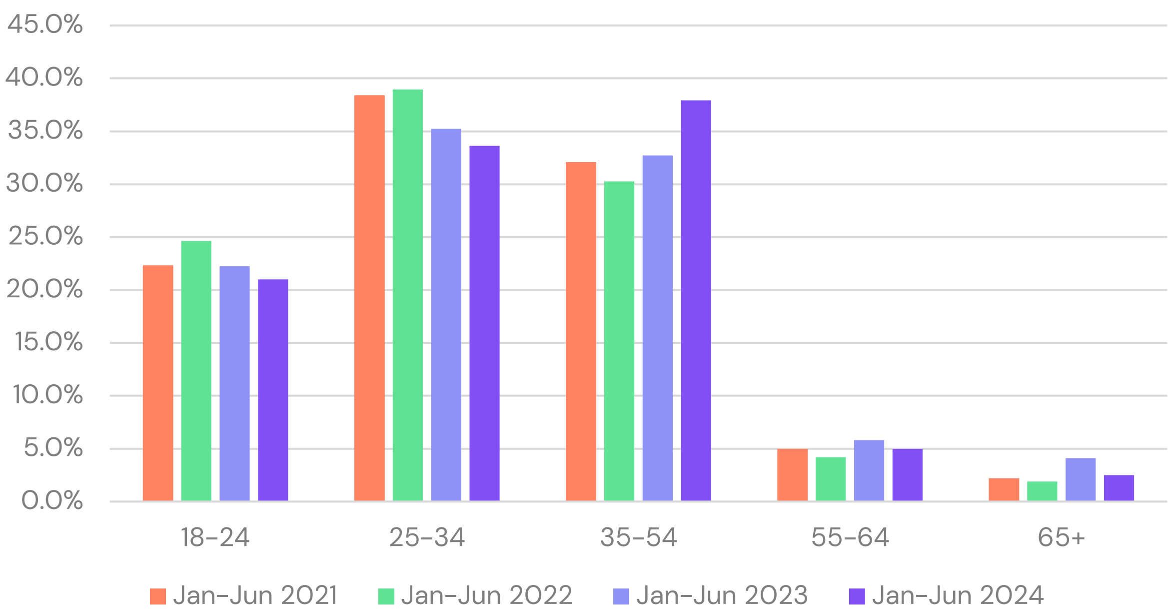
[15] Active accounts are defined as accounts belonging to customers who played at least once during the period under review.

Online Gaming: Players' Profile

Demographic Group

The proportion of players from the 25-34 and 35-54 age groups are similar, accounting for 33.6% and 37.9% of players using websites regulated by the MGA in the first half of 2024, respectively. Chart 16 suggests a potential trend towards an ageing player demographic. However, this shift may largely reflect changes in the operator base under the Malta licence. Over the medium to long term, the potential impacts of changing preferences by different demographic cohorts would need to be monitored.

Chart 16: Online Gaming - Players' Profile by Age Group Distribution



In terms of gender distribution, while males continued to constitute the largest category of players, there has been an increase in the number of players with an unknown gender. The latter group has grown from 7.5% of the total player base in the first half of 2023, to 16.7% in the first half of 2024. This is attributed to a more inclusive approach to player registration, whereby players are not required to provide such information. Male players accounted for 63.2% of the total player base, a decrease of five percentage points over the same period last year. The percentage of female players decreased by 3.9 percentage points over the same period last year, accounting for 20.1% of the total player base.

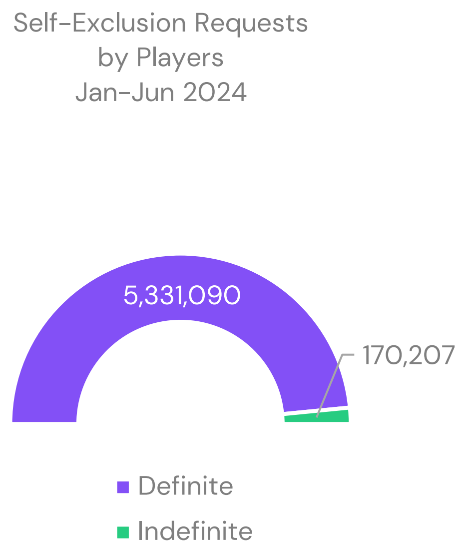
Number of Exclusions

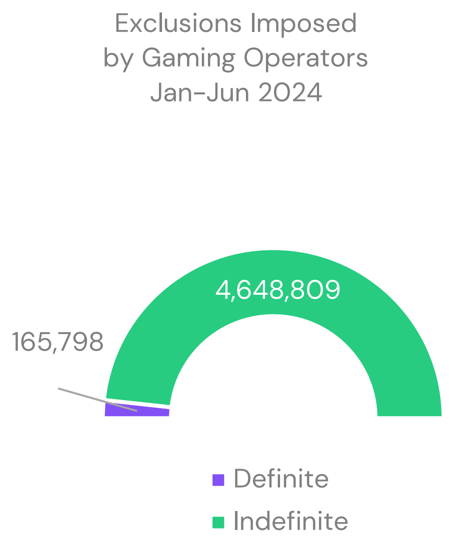
Systems allowing online gamblers to self-exclude for a definite or indefinite amount of time are a requirement for all B2C licence holders. Players within the online gaming market can make their own requests, and operators may also impose exclusions on a player, in cases where there are enough indications that the player may have gambling problems.

The data gathered by the MGA from online gaming licensed operators indicates that the total number of self-exclusion requests (sign-ups) by online players, during the first six months of 2024, amounted to just over 5.5 million. Part of these exclusions may represent self-exclusions by a single player on more than one website. During the same period last year, 1.4 million self-exclusions were registered. The observed increase is largely attributed to the growth in activity and the increased efforts towards enhancing responsible gambling controls and expansion and upskilling of responsible gambling teams.

The majority of players opt for a definite period of voluntary self-exclusion (96.9%). The remaining 3.1% opted for an indefinite period of self-exclusion. During the same reporting period, 1.5% of self-excluded players approached operators to reverse or cancel their self-exclusion request. These exclude instances of definite period exclusion expiry.

Chart 17: Online Gaming - Number of Self-Exclusion Requests





In the case of those exclusions imposed by the online operator, in line with previous trends, the absolute majority (96.6%) were imposed indefinitely.

The age distribution of self-excluded online players indicates that players aged 25-54 years are most likely to request a self-exclusion, accounting for two-thirds of all self-exclusion requests.

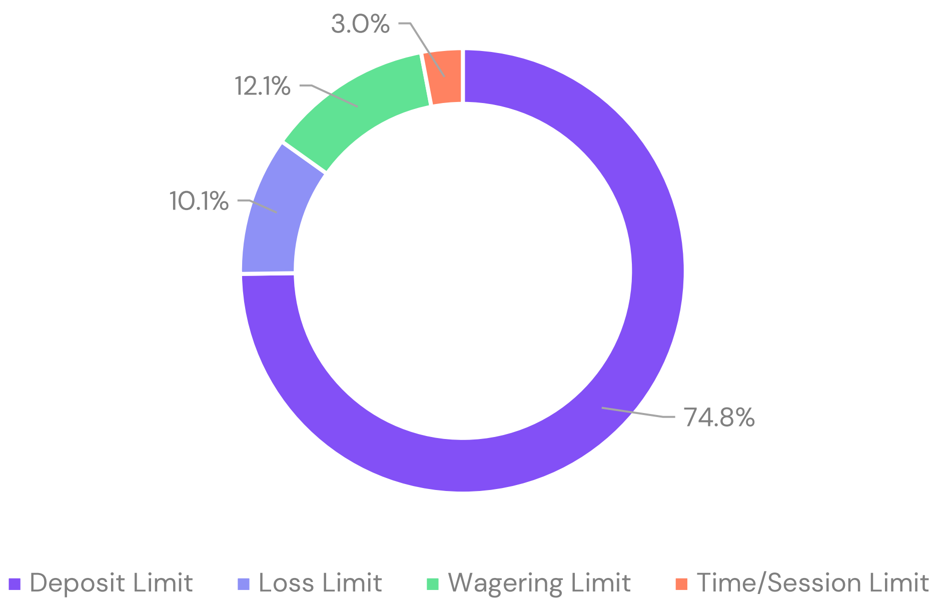
Number of Limits Set and Hit

As an additional responsible gambling measure, players can impose limits on their gaming activity to reduce gambling addictions. Any limit set can only be amended or removed upon the relevant player's request, or expiry of the set duration. These measures are intended to empower players by granting them increased control over time or money spent on gaming activities.

Some operators have revised the figures for the number of deposit limits set and hit during the last reporting period, leading to substantial adjustments to prior estimates. Previously, reported data reflected the cumulative history of deposit limits set and hit over the entire lifetime of the licence. However, operators are required to report only those limits set and hit within the specific reporting period. This discrepancy has now been corrected, and the updated figures presented are not directly comparable to those published in earlier reports.

Online players have set nearly 1.2 million limits covering the four different limit categories, as explained in Chart 18. The majority of limits set were deposit limits (74.8%). During the same period, 18.6% of these set limits have been hit by the players, amounting to just over 220,000 hits.

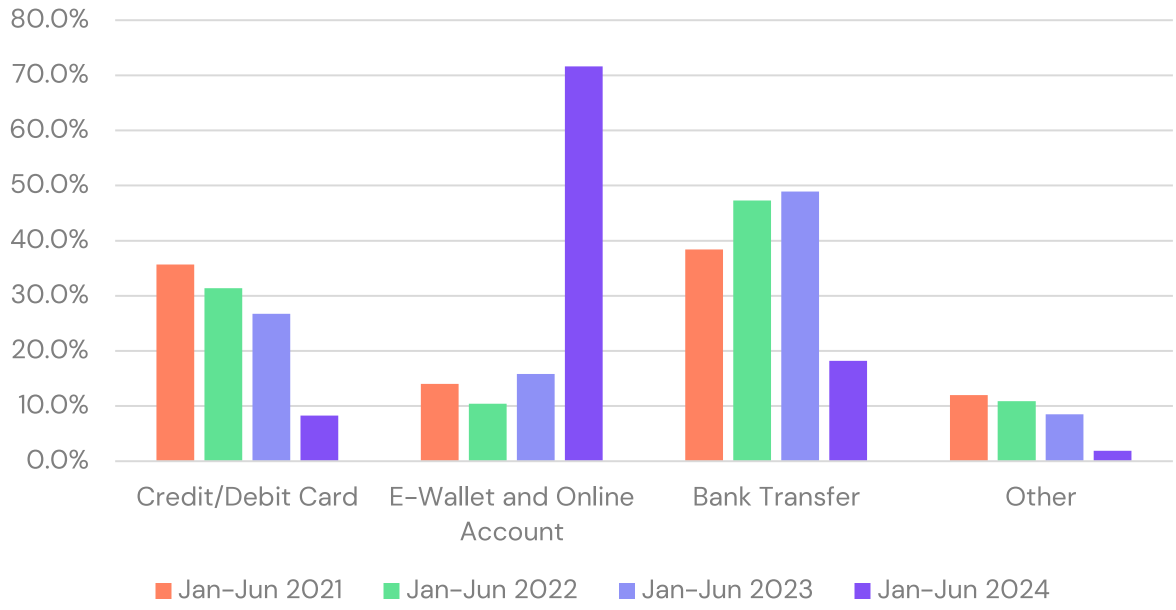
Chart 18: Online Gaming - Limits Set Distribution



Method of Deposits

Contrary to previous periods, e-wallet and online accounts have become the most popular deposit method used by clients of MGA-licensed companies, accounting for 71.6%. This figure represents the development of new business that is strongly focused on e-wallets and online accounts as means of payment. Comparatively, deposits made through bank transfer accounted for 18.2% of all deposits, whilst deposits made by credit/debit cards accounted for 8.2% of total deposits. The remaining 1.9% of payments were made through other methods.

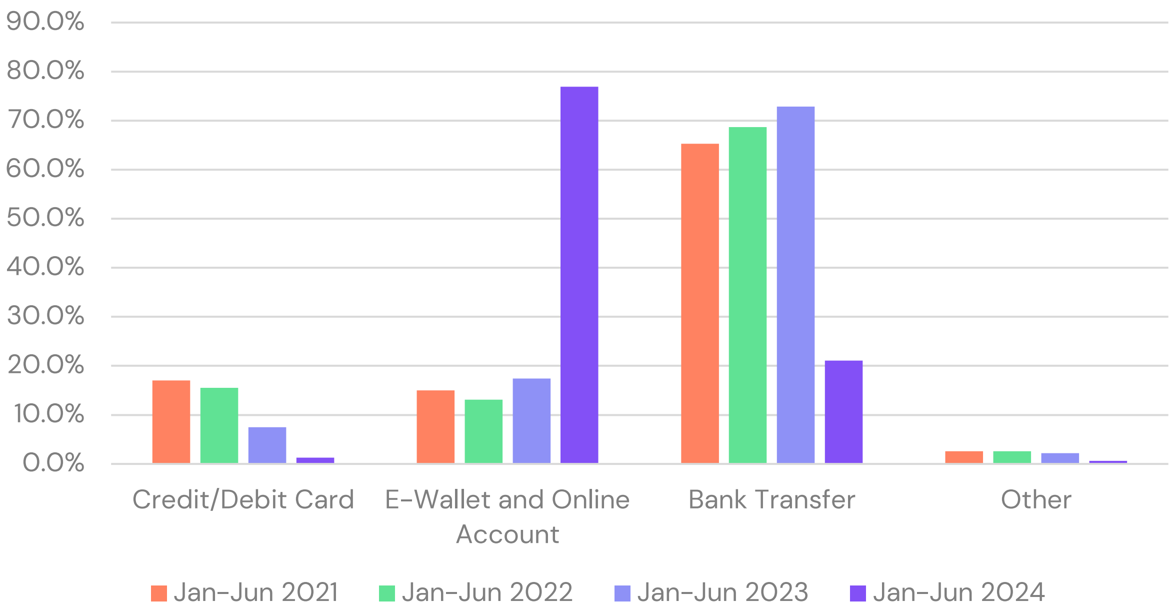
Chart 19: Online Gaming - Methods of Deposits



Methods of Withdrawal

Similar to the preferred methods of deposits, e-wallet and online accounts have become the most preferred method of withdrawal by players, constituting 76.9% of all withdrawals. Online gaming operators indicated that bank transfers and credit/debit cards were the chosen methods for 21.1% and 1.3% of withdrawals, respectively. The remaining 0.6% were made through other methods.

Chart 20: Online Gaming - Methods of Withdrawal

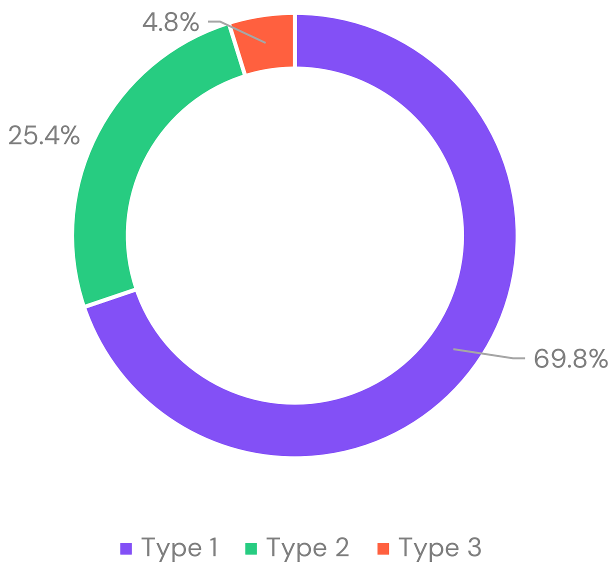


Online Gaming: Gaming Revenue from Customer Gaming Activities

It is estimated that 69.8% of the total GR of the B2C licensees operating in the online industry was generated through gaming activities classified under the Type 1 group, which is a decrease of 3.0 percentage points when compared to the same period in the previous year. In contrast, the GR generated from games falling under the Type 2 category accounted for 25.4% of the total, increasing from the 21.6% registered in the first six months of 2023. The share in GR of Type 3 decreased slightly to 4.8% from the 5.6% reported for the same period last year.

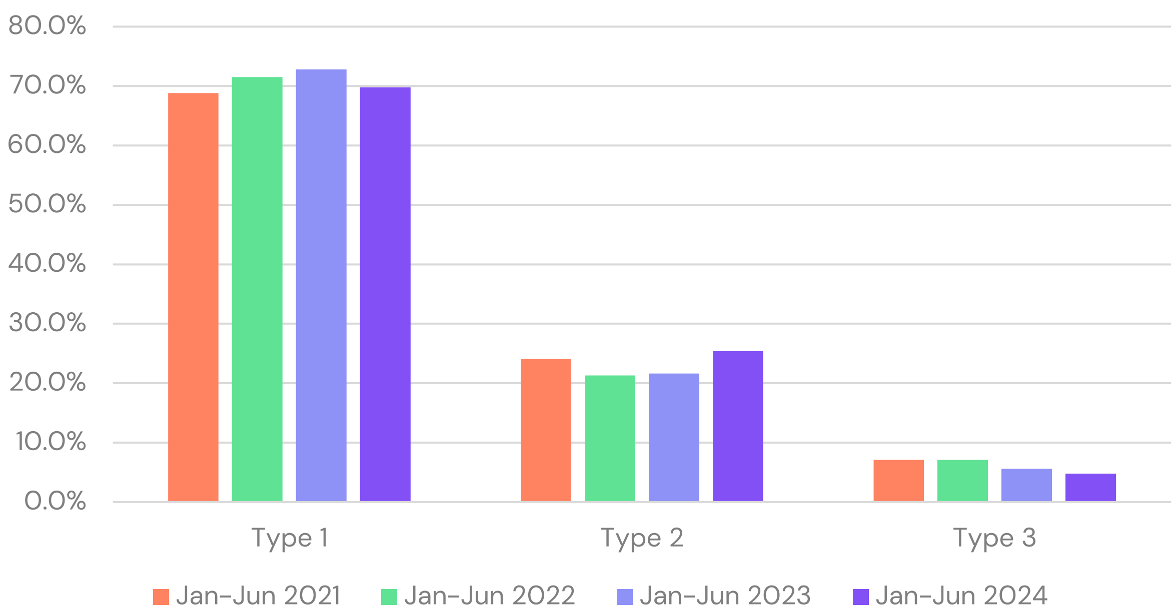
The activity reported for the controlled skill games classified under Type 4 was minimal in comparison with other game types and accounted for less than 1% of the total GR generated in the first half of 2024.

Chart 21: Online Gaming - GR Distribution by Game Type



The distribution of GR across the various game types remained very similar to that in the same reporting period of 2023, as shown in Chart 22.

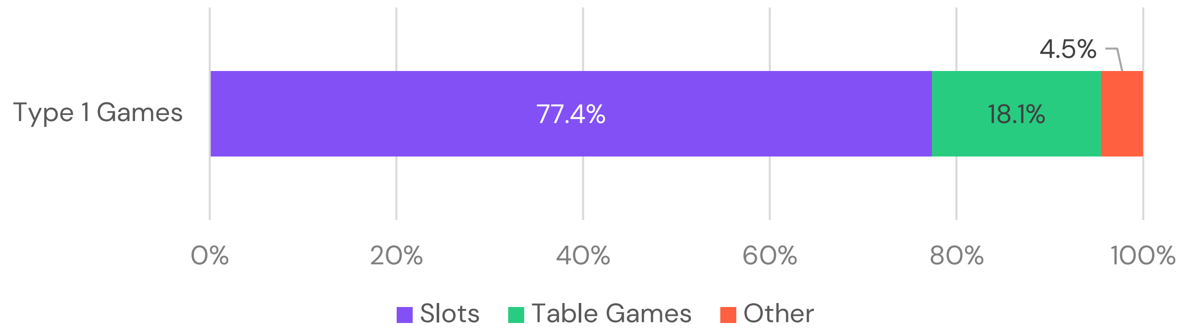
Chart 22: Online Gaming - GR Distribution by Game Type



Type 1 Games

Out of the 69.8% of the total GR generated through Type 1 games, 77.4% was generated through slot games, whilst 18.1% was generated through table games. The remaining 4.5% of the GR for the Type 1 group was generated through other games, such as virtual sports games.

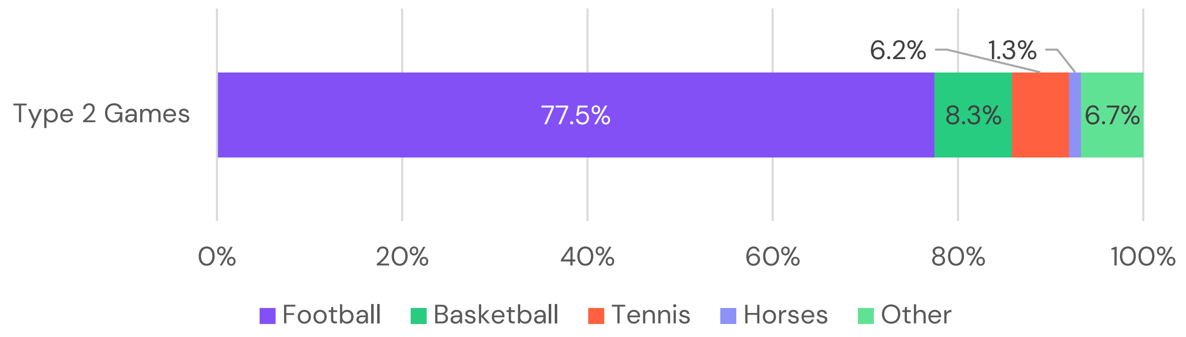
Chart 23: Online Gaming – Type 1 Games – GR Distribution



Type 2 Games

When considering the GR generated from Type 2 game categories, the highest portion of GR has consistently come from football, standing at 77.5%. Betting on basketball accounted for 8.3% of the GR from Type 2 games, followed by 6.2% from tennis. The GR generated from horse racing constituted 1.3% of the total GR from Type 2 games. The remaining 6.7% of GR was generated through other bets, including esports, cricket, golf and motor sports.

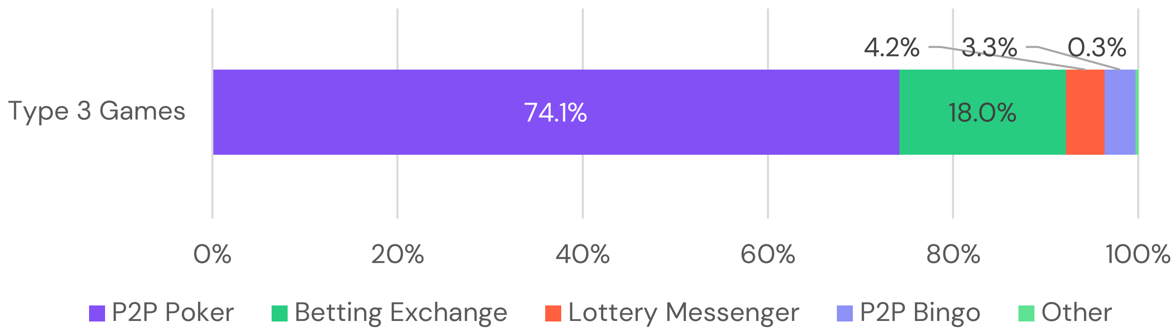
Chart 24: Online Gaming – Type 2 Games – GR Distribution



Type 3 Games

The preference towards peer-to-peer (P2P) poker is sustained, being the highest GR-generating Type 3 game, covering 74.1% of the GR generated from Type 3 games. Betting exchanges accounted for 18.0%. The share of GR from lottery messenger is of 4.2%, while P2P bingo stood at 3.3%. The remaining 0.3% of the GR was generated by other games offered through Type 3 approval.

Chart 25: Online Gaming – Type 3 Games – GR Distribution



Note: The total percentage does not add up to 100% due to rounding of figures.

Online Gaming: Compliance Contribution

The amount of compliance contribution payable by the operators depends on the type of approval issued by the Authority, and it is strictly correlated with the GR generated during the licence period. For the first half of 2024, the MGA collected €22.1 million in fees and taxes owed in relation to the applicable legislation. The gradual decrease in revenue over the years is attributed to the increase in B2B licences and decrease in B2C licences, as can be noted in Table 38. Since the calculation of GR is not applicable to B2B operations, these do not pay related compliance contributions. This is reflected in the figures in Table 38.

Table 38: Online Gaming - Compliance Contribution and Licence Fees

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Total [€]	28,544,223	23,759,809	25,224,756	21,542,323	23,343,921	19,311,416	**22,113,532**

Note: The above figures include the compliance contribution fee, licence fees, and a 5% consumption tax on customers located in Malta in line with the Gaming Tax Regulations (S.L. 583.10).

Online Gaming: Employment

The number of FTE employees in Malta directly working with online gaming companies licensed by the MGA on the activities covered by the Authority's licences at the end of June 2024 stood at 9,522. An additional 3,421 FTEs are estimated to have been in Malta working with online gaming companies licensed by the MGA on activities not directly related to the activities authorised by the Authority[16].

Table 39: Online Gaming – Employment (FTE)

	2021		2022		2023		2024
	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	Jan-Jun	Jul-Dec	**Jan-Jun**
Type A	9,496	9,919	10,106	10,365	9,729	9,609	**9,522**
Type B	1,840	1,852	2,784	2,139	3,249	2,885	**3,421**
Total	11,336	11,771	12,890	12,504	12,978	12,494	**12,943**

Similar to the levels reported in previous reporting periods, as of the end of June 2024, 57.4% of all Type A employees within the online gaming industry in Malta were male, and 73.4% were non-Maltese.

[16] For more information on employment, please refer to Point 8 of the Methodology.

Appendix 1 – Statistical Regions and Districts of Malta

Local Administrative Units (LAUs)	
Districts (LAU1)	**Locality (LAU 2)**
Southern Harbour	**Cospicua, Fgura, Floriana, Ħal Luqa, Ħaż-Żabbar, Kalkara, Marsa, Paola, Santa Luċija, Senglea, Ħal Tarxien, Valletta, Vittoriosa, Xgħajra.**
Northern Harbour	**Birkirkara, Gżira, Ħal Qormi, Ħamrun, Msida, Pembroke, San Ġwann, Santa Venera, St Julian's, Swieqi, Ta' Xbiex, Tal-Pietà, Tas-Sliema.**
South Eastern	**Birżebbuġa, Gudja, Ħal Għaxaq, Ħal Kirkop, Ħal Safi, Marsaskala, Marsaxlokk, Mqabba, Qrendi, Żejtun, Żurrieq.**
Western	**Ħad-Dingli, Ħal Balzan, Ħal Lija, Ħ'Attard, Ħaż-Żebbuġ, Iklin, Mdina, Mtarfa, Rabat, Siġġiewi.**
Northern	**Ħal Għargħur, Mellieħa, Mġarr, Mosta, Naxxar, St Paul's Bay.**
Gozo and Comino	**Fontana, Għajnsielem, Għarb, Għasri, Munxar, Nadur, Qala, San Lawrenz, Ta' Kerċem, Ta' Sannat, Victoria, Xagħra, Xewkija, Żebbuġ.**

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