

Online Gambling: Today's Possibilities and Tomorrow's Opportunities

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With the development of new information and communication technologies (ICT), above all computers and the internet, new forms of online commerce have emerged. The gambling industry began using the power of the rapidly developing virtual market by offering its services in online casinos. The phenomenon of online gambling has encouraged researchers to direct their work into various areas, including the characteristics or profile of online gamblers. In light of the data on the growth of the market for online gambling it is evident that, in the relation between the many types of traditional and online gambling, visits to traditional casinos predominate, as do predictions about the development of the internet. We therefore decided to examine the characteristics of gamblers in traditional casinos and to determine what percentage of them also gamble online, as well as to establish their profile. The aim of the research was to determine how their characteristics in respect of the development of the internet and the growth of the market have influenced the subsequent development of traditional and internet casinos. We predict that both types of gambling, each in its own way, will compete for gamblers. For traditional casinos the best solution seems to be opening their own online casinos; online casinos will have to remain abreast of the development of the internet and communication technology.

Key Words: online gambling, online casino, online gambling product
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The Virtualization of the Global Market and Online Gambling

Games of chance have a long history. The first registered casinos in Europe arose at the outset of the 17th century, and a century later casinos appeared in America. The development of games and casinos initially followed the development of societal life, whereas in the past century

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they have to a great extent followed the development of technology. The first true 'revolution' was the possibility of betting over the telephone; today such possibilities are enabled through use of computer technologies, as the phenomenon of the internet has brought games of chance into practically every household.

Mass use of the internet, which has been made possible through the ease of access to the media and technology that is available inexpensively, has changed the manner of thinking of many who offer their goods to the market. The first were salesmen who were soon to recognize the advantages of this widespread technology.

The internet has not only become a global communication medium but is also becoming a global tool for global merchants trying to sell their services on the virtual market. Studies suggest a rising trend of consumption in the global virtual market; in the last years it has been rising by more than 30 percent annually.

The growth in internet use is best illustrated by the data, albeit based on the American market, indicating that it took the internet seven years to enter 30% of households, the telephone 38 years, and electricity 46 years (Shaffer 2004). Studies show that the most widespread internet activity is e-mail, with 87.9% prevalence among internet users, followed by web surfing or browsing, reading news or searching for information about entertainment, hobbies, travel, and buying online; playing games is in ninth position, with 26.5% prevalence among internet users (Cole et al. 2003).

The knowledge of virtual merchants and the power of the rapidly growing global market were employed by the gambling industry when it began offering its services in the virtual space about ten years ago. The first online casino was Interactive Casino, Inc. (ICI), which first appeared on August 18, 1995 with 18 different casino games, online access to the National Indian Lottery, and plans to launch an Internet Sports Book (Janower 1996; Subhajt 2006; Lipton 2002; Karadbil 2000). Since the beginning of widespread introduction of the internet into domestic settings, the number of online gaming sites has increased at a staggering rate each year. In May 1998 there were approximately 90 online casinos, 39 lotteries, 8 online bingos and 53 sports books. Within a year, these figures had increased to 250 online casinos, 64 lotteries, 20 bingos and 139 sports books (Wood and Williams 2007). Research indicates that from 2000 to 2002 there were between 1500 and 1800 active online gambling sites (Eadington 2004; Sinclair et al. 2002; Unites States General Account-

ing Office 2002), and at present between 2300 and 2500 such sites are in operation (Clark 2005; Ranade et al. 2006). This rapid growth in the number of sites in recent years may be tapering off, as the big companies buy out smaller sites (Ranade et al. 2006).

Parallel to the growth in internet casinos is a growth in development of suitable information solutions that help promote offers that are both credible and gambler-friendly. Online casinos, which are striving to become and remain serious providers of games of chance, are investing in those information solutions which offer uninterrupted online support to the gambler, prevent criminality and ensure the credibility of the operations, because this is what offers them a competitive advantage.

Characteristics of Online Gambling

DEFINITION OF ONLINE GAMBLING

Gambling has many different meanings depending on the cultural and historical context in which it is used. In western society, it usually has an economic definition, referring to 'wagering money or something of material value on an event within an uncertain outcome with the primary intent of winning additional money or material goods'. Typically the outcome of the wager is evident within a short period of time (see <http://www.sportspool.com/gambling>). Cabot (1999) defines gambling as any activity in which a person risks something of value on the outcome of an uncertain event, in which the bettor does not exercise any control or is determined predominantly by chance.

The notion of online gambling is, like the phenomenon itself, relatively new. In the relevant literature the following expressions that describe gambling over the internet can be found: 'online gambling', 'internet gambling', 'casino gaming on the internet', 'cyber gambling', 'online wagering' or 'remote gambling'. It should be noted here that two main types of gambling occur on the internet: gaming (casino style games) and betting or wagering (racing and sports events). The generic term 'gambling' refers to both types. In the context of this research and article, we will use the term 'online gambling' to mean playing casino style games over the internet.

We would also like to point out that other expressions can be found in the literature that refer to the notions of 'online' and 'internet gambling' and are closely related to the online gambling industry. Let us name some of them: 'internet-gambling sites', 'online gambling web sites', 'inter-

net gambling industry', 'online gambling industry', 'interactive/internet gamblers', 'gambling market', 'internet casino player', 'internet gambling operators', 'internet gaming product', 'online gambling services', 'internet gaming market', 'internet virtual casino', and similar.

Online gambling is possible via two technologies: the internet and digital television. It is characterized by three factors: electronic operation, service-based organization in the field of gambling, and consumers (or buyers) of gambling services. In the paper we speak of online gambling when the key activities typical for games of chance (usually taking place in a traditional casino) occur in the virtual space with the help of the internet.

To realize the idea of an online casino, a suitable piece of technology is required which represents a complex information solution. A basic requirement for an online casino provider or an online games provider is to have a relatively powerful server, appropriate software and suitable support activities, all interconnected in a logical way that creates a unified and integrated system. On the other hand, a player needs a computer equipped with software that allows access to the internet and supports graphically demanding programs. The link between the two is the internet – a virtual medium between the casino and the player.

We can establish that online gambling is a global activity, from both a technological and an organizational viewpoint. In terms of technology, this is understandable because it works via the internet; in terms of organization, this is less evident. The cause of such an 'organizational globality' rests in the indeterminacy of the legal operating of online gambling. Due to the lack or even absence of regulation, online casinos have discovered means of operating out of several countries simultaneously. As certain authors indicate (Cabot 2001; McMillen 2003; Balesta and Cabot 2002), online casinos often carry out their activities such that they have their headquarters, server for games and support centres dispersed over various locations in several countries, depending on the regulations of each individual country.

Eighty-five jurisdictions around the world currently regulate some form of online gambling, but most such businesses are clustered in a few places. The vast majority of internet gambling sites are located offshore from North America, with a large concentration in Antigua (Cabot 2001). But many anticipate that online gambling businesses will be drawn to the United Kingdom as it implements its Gaming Act 2005, which significantly liberalizes regulation of online gambling. Taxes on online

gambling will be higher in the UK than in other jurisdictions, but doing business in the UK offers substantial advantages, such as a stable political environment, vibrant capital markets, a reliable communications infrastructure, a large pool of skilled workers and regulations that should inspire confidence among customers and investors (Stewart 2006; Ranada et al. 2006).

Otherwise, the legal operating of internet gaming follows the three fundamental approaches which came into force in 1997:

- the Australian approach, which supports internet gambling, though only in accordance with licensing, regulations and taxation,
- the European approach, which is moving towards allowing internet gambling with controls and limitations for residents of the individual country,
- the American approach, where online gambling is not desired and should be prohibited.

A COMPARISON OF ONLINE AND TRADITIONAL GAMBLING

The gambling process in an online casino differs from the one in a traditional casino, even though it imitates some of the latter's elements. The most obvious similarity between an online casino and a traditional casino is in the selection of games. The whole selection of games typically offered by traditional casinos, e. g. poker, roulette, blackjack and slot machines, is mimicked by online casinos' high quality graphics and special visual and sound effects. The tendency to imitate traditional casinos as authentically as possible is so strong that they even use animation to recreate the casino rooms and people in them. Online players require computers equipped with appropriate software and access to the internet. Once they choose an online casino, they have two options: playing for money or playing free games. If they decide for the latter option, they can either enter their personal data (and thus have the chance of receiving a free prize) or play anonymously without the chance of receiving a prize. Free gambling – the casinos also call it 'practice mode' – is also a great way of familiarizing yourself with the games offered by the online casino and testing them.

Online casinos are striving to offer a selection of games as similar as possible to the one in traditional casinos, however, on the basis of certain features, some differences can still be observed, and only further studies can determine if these can be referred to as advantages or weaknesses.

TABLE 1 Characteristics of online and traditional gambling

Characteristics	Online casinos	Traditional casinos
Language	Multiple languages can be used.	Usually operates in one language.
Currencies accepted	Various currencies can be used, depending on which country the gambler is from.	Normally operates using only one currency.
Means of payment	A wide variety of payment options, various cards are accepted.	The usual means of payment is cash; a limited number of cards are accepted.
Money used	Online gamblers play with real money (they are not required to exchange the money for chips on entering the casino).	Gamblers always exchange money for chips.
Dress code	No requirements, you can play anywhere, wearing whatever you want to.	There are policies and regulations about the dress code; players wearing inappropriate clothing are not allowed to enter.
Free gambling	A definite possibility, usually included in the offer, mainly as a means of attracting players.	A faint possibility, only on special occasions.
Variety of games	A large variety of games.	A limited choice of games.
Accompanying costs	Only includes internet costs.	Includes transport, accommodation and meal costs.

Continued on the next page

The most important differences between online and traditional casinos are given in table 1.

Development of Online Gambling

The rapid development of online gambling is not merely a result of technological development, but also of the fact that it is possible to play from anywhere. This has transformed many potential players into real ones and consequently expanded the market of casino services. The casino market thus eliminated its dependency on the physical dimension of being geographically restricted only to a handful of countries and could now extend into infinite dimensions offered by the virtual market, depending only on how quickly and to what degree it was able to conquer it.

The first to sense the opportunity were traditional casinos – the internet provided them with enhanced possibilities to increase their earnings.

TABLE 1 *Continued*

Characteristics	Online casinos	Traditional casinos
Instructions/assistance to players	Offers telephone, fax and e-mail assistance; provides clear instructions regarding game rules and playing techniques.	Usually does not offer additional assistance, such as explaining the rules.
Player privacy	Complete privacy, no cameras, no need to register using a personal ID.	Privacy is ensured only outside the casino; inside the guests are monitored by cameras; they have to identify themselves showing their IDs.
Distracting factors	Fewer disturbing factors, only computer graphics and sounds.	Several factors disturbing factors, which are integral parts of traditional casinos.
Atmosphere, players' well-being	The atmosphere is not competitive, the players can relax.	The competitive atmosphere is more intense.
Accessibility	24-hour access, 365 days a year; access from anywhere in the world where there is an internet connection.	Access (entrance) possible only during operating hours.
Operation costs	Usually lower than in traditional casinos, especially with respect to labour and equipment costs.	Usually very high, especially with respect to labour, equipment and premises costs . . .

According to Dandurand (1999), the internet gave traditional casinos the option to transform and expand their basic, traditional offer to online services. Even though the latter represent a very small portion in the structure of all gambling services, they exhibit a very high growth (Hiller and Cohen 2002). From the first operating site with gambling content in 1995, there are now approximately 2500 sites, and experts estimate that the online gambling market is growing at an annual rate of 20% (Stewart 2006). Current estimates for the annual turnover of the online gambling market are between £500 million and £635 million. Estimates vary, as to how large the online gambling market will become, but a number of reports suggest that the market will reach £4 billion by 2010 (Ranada et al. 2006). Other authors estimate that it will reach the annual level of 528 billion dollars in 2015 (Hartman 2006).

We should also point out that the marketing and commercial opportunities have been detected and embraced by companies that have no direct links with gambling services – they have begun cooperating with

the online gambling industry. McMillen (2000, 2003) lists the following factors that encourage investors to invest in online casinos:

- Online casino market is a rapidly growing market yielding high earnings.
- There are only few legislative restrictions on online gambling market entry, especially in the so-called 'off-shore zones'.
- Costs of creating an online casino are low when compared with those of building a traditional casino.

Aside from the possibilities and opportunities offered by the development of online gambling, we should not ignore the grave dangers that have surfaced in the development of online casinos. Studies have shown that there are three of them: problem gambling, youth gambling and criminality (Ranada et al. 2006). Problem gambling is defined as 'participation in gambling to the point where it causes serious harm to oneself and others' (Ranada et al. 2006). Online gambling causes two types of problems: severe ones like depression, thoughts of suicide, debt, poverty, crime, divorce, and more moderate ones like chasing debts, guilt, concealment, depression, high expenditure (Ranada et al. 2006). Online gambling, as opposed to traditional forms of gambling, is more of a risk for young people. Serious online casinos take efforts to prevent youth gambling through various age verification systems. Controls that seem to work include requesting two independent items of verification (one of which has to be the player's passport) (Ranada et al. 2006). According to some authors (Tresniowski et al. 2003) only a small number of online casinos offer effective mechanisms that prevent access to casinos by children. The third danger the online gambling industry is faced with is criminality. There are three types of criminal activity: hacking, fraud by operators and money laundering (Ranada et al. 2006). Ensuring safety in this area is an aspect all serious providers of online gambling are well aware of; they are trying to find effective solutions that not only ensure safe operation but also boost their reputation on the virtual market.

The Study

Within the development of internet gambling there has been a rapid increase in the number of online gamblers, although the latest studies show that the relation between online gamblers and visitors to traditional casinos still favours the latter. The percentage of online gamblers in 2001 was between 0.2 to 1% in relation to gamblers in traditional casinos (Wood

and Williams 2007). Wood and Williams (2007) also state that these are merely estimates and that they should be confirmed and supplemented by further research. Studies have also shown that the profile of the online gambler differs from that of the gambler in traditional casinos, and that this profile is changing with the development of online gambling offers. The most crucial difference between them appears in connection with their demographic and behavioural characteristics. As researchers have shown, it is also true that some visitors to traditional casinos also visit online ones, which could impact on changes to how traditional casinos operate (Woodruff and Gregory 2005; Wood and Williams 2007).

In line with such findings, the study primarily focuses on identifying the share of traditional gamblers who also visit online casinos. We shall also attempt to outline some general characteristics of online casino visitors and identify the reasons why some of them only go to traditional casinos while others visit both traditional and online casinos. Based on the above, we will attempt to assess the impact the gambling market virtualization could have on the future of traditional and online casinos.

SAMPLE AND METHODOLOGY

Because of the fact that the primary purpose of the study was to determine the percentage of traditional gamblers who also gamble online as well as their characteristics, we decided to carry out our survey among visitors to traditional casinos. The methods used were both quantitative and qualitative, as we employed a survey of questions and a semi-structured interview, as we expected that only in such a combination could we satisfy the intentions of the study.

The questionnaire was selected because it enabled us to collect answers to questions about the profile of gamblers and identify the share of those who visit online casinos (the questionnaire can be obtained from the author of the article upon request). The data on players' reasons for visiting a casino were mainly obtained using the questionnaire; however this was not sufficient for an in-depth look into the issues addressed by the study, which is why we decided to conduct semi-structured interviews with the respondents who confirmed visiting online casinos.

The questionnaire contained questions of both closed and half-closed varieties, and the contents of the questions were divided into individual contextual components. For the interview component we prepared the main questions ahead of time, while allowing for the possibility of asking sub-questions to supplement the main questions. We carried out the

interview with each subject by first explaining the intent and goals of the study, ensuring them that all data would remain anonymous and asking them for permission to be taped (in order to facilitate the handling and analysing of the data).

We used random sampling which enables a statistically reliable analysis of the whole population, i. e. at least a 5% accuracy of the estimate, taking into account a 95% confidence interval for the estimated statistical parameter of the population, at the expected value of the statistical parameter. The study included 396 players, 250 of whom were male and 146 female. The whole population of casino visitors in the course of the study consisted of 3214 individuals.

RESULTS OF THE STUDY

First we inquired whether the respondents who visit traditional casinos also visit online casinos. 369, or 93.18%, out of 396 respondents answered that they do not visit online casinos, while 6.82%, i. e. 27 gamblers, also visit online casinos. We conducted semi-structured interviews with the group of gamblers who visit online casinos to determine the reasons for their decision. The interviews with a pre-prepared list of key questions were conducted in the period of five days, during the casino's operating hours. Each interview lasted about 35 minutes.

The primary purpose of the study was to search for reasons why certain gamblers only visit traditional casinos, whereas others also gamble online. It was established that these reasons were indelibly linked to the vicinity of a traditional casino as well as the age of the gamblers. The most important but also expected factor for visiting a traditional casino and the reason for not playing online is the proximity of the casino – 80% of respondents live less than 20 kilometres away. As the second-most important factor for visiting a traditional casino 285, or 77.2%, of those questioned expressed the wish to socialize with other gamblers, which is only possible in a traditional casino environment. The third-most important factor for visiting a traditional casino was entertainment options – 212, or 57.5%, of respondents said that they visit the casino for entertainment offers such as concerts, dancing and so on. It should be emphasized here that the desire to socialize is most common in two age groups: in the age group between 21 and 30, and in the age group between 31 and 40. The reasons for visiting a traditional casino also include safety issues – 135, or 36.6%, of respondents are largely afraid of their personal information being abused, sent over the internet. Such fears are

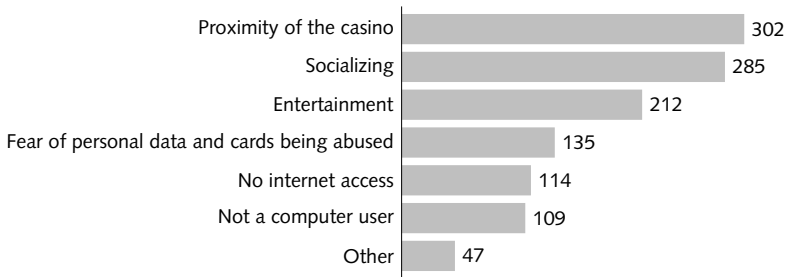


FIGURE 1 Why traditional players do not visit virtual casinos

most pronounced in the age group above 50. Not using the internet or a computer are two factors which are crucial in examining the reasons for visiting a casino. Although studies have shown a strong increase in the use of computers and the internet, there are nevertheless still many people without regular internet access or who do not have a computer at all. 114, or 30.9%, of respondents expressed, as a reason for visiting a traditional casino, that they do not have internet access; 109, or 29.5%, do not use computers. Both groups are predominantly made up of people older than 50 years. 47, or 12.7%, provided other reasons for visiting a traditional casino. The results are shown in figure 1.

The results shown, indicating the reasons for visiting traditional casinos, can simultaneously be understood as reasons for why traditional gamblers do not visit virtual casinos or why online gamblers do visit online casinos. For this reason the results obtained also proved helpful when we were carrying out the interviews.

The visit to a traditional or online casino is actually relatively closely linked to the age of players. As shown in figure 2, in the age group above 50, none of the respondents visit online casinos, which is slightly less than a half of all respondents, i. e. 48.3%. In the age group between 21 and 30, 7 out of 77 respondents also visit online casinos, in the age group between 31 and 40, 13 out of 105 respondents use online casinos, while in the age group between 41 and 50, only 7 out of 85 respondents visit online casinos.

The gamblers who use the services of online casinos were interviewed to determine their general profile. Most of them are males, 23 out of 27 were men and 4 were women. As we have already established in the presentation of the age structure, online players are representatives of the younger generation, the oldest interviewee was 44 years old. Most respondents hold middle or high positions in the organization structure

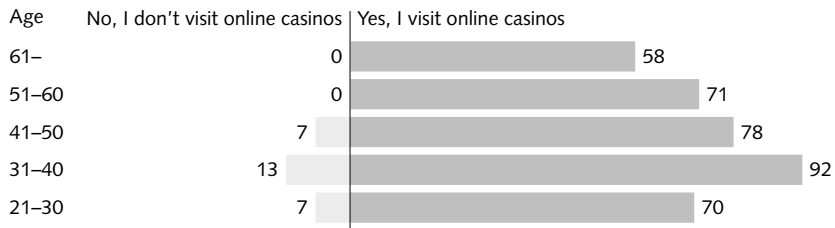


FIGURE 2 Age structure of visitors to online and traditional casinos

of the organizations where they are employed, and have, on average, secondary school or university education. All interviewees use computers and internet on a daily basis and have access to broadband connections. Most of them access online casinos at home, more rarely from their workplace. They have a positive attitude towards the internet and online services and a high degree of trust in the information technology. They do not use the internet to access only online casinos but for other services as well, e. g. online banking, shopping and such.

In the interview we were also interested in how often they visit online casinos and what type of games they play. Our finding was that the majority of respondents visit online casinos once a week or even less frequently, while only 4 respondents play at least twice a week. It is interesting that the respondents visit online casinos on weekdays, mainly from Monday until Thursday, while on weekends, i. e. from Friday until Sunday, they prefer going to traditional casinos. When they gamble online, they almost exclusively play the games at gambling tables and are not very keen on slot machines. When they play over the internet, they make smaller wagers compared to those in traditional casinos. This is not surprising since their average playing time in online casinos is shorter than in traditional casinos.

Since the gamblers who only go to traditional casinos were asked for the reasons behind their decision, a similar question was posed to online gamblers as well. Their main motive for gambling online is the lack of time caused by work and family related matters. 40.74% or 11 respondents stated this as the main reason. It is interesting that more than a fifth of respondents (22.23%) stated that they had visited an online casino only once. They were disappointed with the visit. They believe that online casinos do not offer the same level of adrenalin rush as traditional casinos. They did not return for a second visit because playing over the internet meant playing alone, without their usual company and because

they want to share their experiences with other casino visitors. Consequently, a fifth of respondents do not intend to visit an online casino again.

Almost a fifth or 18.25% of the respondents visit online casinos because of geographical considerations – they live 40–70 kilometres from the traditional casino.

A tenth or 11.11% of respondents gave a large variety of games as the reason for visiting online casinos; online casinos enable them to play games they miss in traditional casinos.

The reasons for visiting online casinos are also privacy and the peaceful environment the players can enjoy while gambling online. 7.4% of respondents claimed that they preferred gambling online since it gave them enough time to think and play in peace. While gambling online, they are not disturbed by other casino visitors.

Conclusion

The development of technology and communication offers numerous possibilities to do business across large distances and opens up various market opportunities. Consequently, the traditional notion of market as a geographically relatively limited space has changed, market activities have moved to the global, geographically unlimited, virtual space. The opportunities of the rapidly growing virtual market were soon noticed by the gambling industry, and gambling services began appearing on the internet. The first to recognize the opportunity were traditional casinos, which saw online games as an addition to their traditional offer and a smart marketing move. As studies have shown, from the first operating site in 1995 to the more than 2500 internet sites currently offering virtual casinos, the online gambling market has been growing at a rate of 20% per year. The development of the internet and communications technology has given rise to the phenomenon of virtual casinos. The article deals with this phenomenon and its development in comparison with traditional casinos, the characteristics of both the online and the traditional gambler, and their influence on the future of gambling.

The phenomenon of online gambling has encouraged researchers to direct their work into various areas, including the characteristics or profile of online gamblers. In light of the data on the growth of the market for online gambling, the fact that in the relation between the many types of traditional and online gambling visits to traditional casinos predominate, as well as predictions about the development of the internet, we

decided to examine the characteristics of gamblers in traditional casinos and to determine what percentage of them also gamble online, as well as to establish their profile. The aim of the research was to determine how their characteristics in respect of the development of the internet and the growth of the market have influenced the subsequent development of traditional and internet casinos.

The study primarily focused on identifying the share of traditional gamblers who also visit online casinos and their reasons for doing so. We established that less than seven percent (6.82%) of traditional gamblers also gamble online. Interestingly, many among them were not impressed by the services of online casinos, so they decided to visit only traditional casinos in the future. We have also determined that the main advantages of online casinos, which attract the gamblers to visit them, are accessibility (no geographical limitations), large variety of games, privacy and a peaceful environment. The reasons for visiting online casinos are exactly opposite to the reasons for visiting traditional casinos: geographical proximity, possibility to socialize with friends and optional additional entertainment. The gamblers who visit online casinos have a positive attitude towards information technology, and are representatives of the younger generation. Such characteristics are also mentioned in other studies in the field which have come to similar conclusions. They state, among other things, that online gamblers are computer- and internet-savvy, that they are younger, that they have above-average education, and that they choose to gamble online because that allows them to play alone. In contrast, traditional gamblers do not visit virtual casinos primarily because they wish to socialize with other gamblers.

We can conclude that online casinos are, in fact, competitors to traditional casinos. Consequently, they face the challenge represented by the virtualization of the gambling market, to which they will have to find an appropriate answer if they want to take their slice of the pie in the rapidly growing market of virtual casinos. There seem to be only two options for traditional casinos: the first is to create their own online casinos, which would be a smart promotional and marketing move, and the second is to transform online gamblers into traditional gamblers at least on weekends.

Without a doubt, online casinos will also attempt to expand their market, mainly by using the developing information technology. Since the findings of the above study show that one of the reasons for avoiding online casinos is the desire to socialize, we could suggest that a possible

solution would be to create interactive links between online gamblers using web cameras. Today the players are still playing against virtual partners but in the future they will be able to see their gambling partners and to socialize with them over the internet. Online casinos of the future will invest a lot of their efforts in the development of technology that will link the players in the virtual space and provide services that offer the kind of socializing that is usually experienced in traditional casinos. Such virtual socializing could also reduce the fear and distrust of online casinos, which is among the main reasons why gamblers still prefer to visit traditional casinos.

Despite the numerous ethical questions and dangers posed by online gambling, it seems that new technological solutions provide new opportunities for the development and growth of the industry. It depends on the wider social environment and the providers of online gambling whether these casinos continue to exist in the future, or else are banned by the legislative authorities.

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