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彩票蓝皮书

BLUE BOOK OF LOTTERY

中国彩票发展报告 (2015)

益彩基金/编

ANNUAL REPORT ON CHINA'S LOTTERY (2015)

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编者 / 益彩基金



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益彩基金奉行“源于社会奉献社会”的公益理念，秉承服务大众、服务行业、服务社会、服务科学的公益原则，致力于推动社会公益项目的全面发展，致力于推动公益彩票、责任博彩领域及关联行业的公益、科学、健康、可持续性发展，致力于推动世界科学发展和社会进步。目前益彩基金是中国唯一一家支持公益彩票及责任博彩领域的全国公募型专项基金。

Introduction of Editor

YICAI FOUNDATION The Yicai Foundation is a public welfare fund established by the China Overseas-Educated Scholars Development Foundation and directed by the United Front Work Department of CPC Central Committee. It is in charge of managing and raising a public welfare fund supporting domestic and overseas governmental organizations, corporations, social groups and individuals. As a nationwide non-governmental organization, the Foundation manages, raises funds for and makes voluntary donations to public welfare development projects connected to the lottery and gaming industries.

At the core of Yicai Foundation is the fundamental principle that a society should benefit from what it puts forward. It thus operates in the service of individuals, businesses and scientific welfare principles. By striving to nurture comprehensive public projects promoting the healthy, scientific and sustainable development of gaming, lottery, gambling and other related industries, the Foundation works in pursuit of general scientific advancement and societal progress. Presently, Yicai Foundation is the only existing nation-wide initiative devoted to upholding responsibility in the domains of gaming.

序

二十一世纪初是世界政治经济发生深刻变革的历史时期，政治区域化新格局的形成、经济全球化的深入使得世界各国都面临巨大的挑战和机遇，中国正以全球瞩目的速度步入大国、强国之林，不但表现在经济方面厚积薄发的稳健崛起，更表现在科研学术、理论人才方面的重视和成就。

中国留学人才发展基金会益彩基金在成立之初，即以致力于推动世界科学发展和社会进步为宗旨。作为怀揣“中国梦”的 NGO，益彩基金不但为中国公益事业尤其是中国公益彩票事业的基础理论研究和科学发展做了诸多贡献，更以大国 NGO 之风范，领先于西方彩票博彩发达国家，着力推动国际责任博彩的科学发展。

为了填补中国公益彩票领域的基础学术空白，中国留学人才发展基金会益彩基金管理委员会经审慎研究，确定设立科研类公益项目“彩票蓝皮书”。于 2014 年度开始，组织专家学者、政府监管部门和行业专业人士对中国彩票的发展情况进行系统梳理，以独立、公正、科学的第三方视角对中国彩票领域进行全面、客观的分析和研究，着力剖析展现中国彩票历史及发展的全景。首度将香港、澳门、台湾地区的彩票博彩发展情况纳入本皮书，开启了大中华彩票区域化共融发展之先河。本皮书以发展和责任的视角，构建多元体制下、涵盖彩票利益各方的责任评估体系，为彩票发展提供了科学实践方法。本皮书每两年出版一部，将对大中华区域彩票情况作横向和纵向持续性的研究和发布。

我谨代表中国留学人才发展基金会益彩基金管理委员会，感谢为



新中国公益彩票事业做出贡献的彩票各界人士！感谢政府彩票监管部门领导对于本公益项目的鼎力支持！感谢参与本皮书研究编纂工作的大陆、香港、澳门、台湾的专家学者！“彩票蓝皮书”凝聚了两岸彩票人的共同智慧，它是大中华彩票领域的共同成果，也是中华彩票科研学术共融发展的里程碑！

付欣忱

中国留学人才发展基金会理事

中国留学人才发展基金会益彩基金管理委员会主任

2015年3月

Preface

The beginning of the twenty-first century saw a historical period of profound change in both politics and economy, in which the new pattern of political regionalization and the deep-going development of economic globalization have brought challenges as well as opportunities to the world. China is becoming one of the world's biggest powers at a speed arousing worldwide attention. This can be witnessed not only by the steady rise of its economy, but also by its great attention to academic research and theoretical talents cultivation, and the corresponding achievements.

Since its establishment, the YICAI Foundation Management Committee of the China Overseas – Educated Scholars Development Foundation has been committed to promote world scientific development and social progress. As a NGO cherishing the “China dream”, Yicai Foundation has not only done great contributions to the basic theoretical research and scientific development of China's public welfare causes, especially public welfare lottery undertakings, but also, as an NGO of a great power, assumed a lead in lottery undertakings over the western developed countries, striving to promote the scientific development of international responsible gambling.

In order to fill in the gaps in basic academic research of China's public welfare lottery, the YICAI Foundation Management Committee, after careful investigation, decided to come up with the *Blue Book of China Lottery Development*—a commonweal project on scientific research. The project was started in 2014 and involves related experts, scholars, governmental supervising institutions and other insiders, who conducted



objective and comprehensive researches on China lottery with an independent, fair and scientific third-party perspective, trying to give China lottery development a systematic summary and a historical panorama. This book unprecedentedly covers the lottery development in Hong Kong, Macau and Taiwan, marking the harmonious regional development of the Greater China. Viewing from perspectives of development and responsibility, it offers scientific methods for developing lottery undertakings by constructing a pluralistic responsibility assessment system with all stakeholders considered. Published very second year, this blue book will be continuously studying and releasing the lottery development in Greater China.

On behalf of the YICAI Foundation Management Committee of the China Overseas – Educated Scholars Development Foundation, I would like to extend our sincere gratitude to those insiders who made great contributions to the development of China public welfare lottery undertakings after the founding of the People’s Republic of China, to the governmental lottery supervision organizations for their big support to these lottery undertakings, and to the experts and scholars in the mainland, Hong Kong, Macao and Taiwan for their participating in researching and compiling of this book. The *Blue Book of China Lottery Development* embodies the common wisdom of the mainland, Hong Kong, Macao and Taiwan. It is a common result in lottery development of Greater China, a milestone of academic research cooperation and harmonious development in lottery undertakings!

Fu Xinchun

**Director of China Overseas – Educated Scholars
Development Foundation**

Director of YICAI Foundation Management Committee

摘要

《中国彩票发展报告（2015）》（“彩票蓝皮书”）由中国留学人才发展基金会益彩基金管理委员会主持编写。本书是中国彩票发展报告的第一部，由总报告、福彩体彩篇、港澳台篇、社会责任篇、专题研究篇、附录6部分构成，对新中国彩票创设以来的发展过程进行了系统梳理，对其发展过程中所涉及的多方面内容及问题进行了回顾和总结，试图以此奠定彩票发展系列报告的基础。

20世纪80~90年代，在改革开放背景下，新中国（大陆）的彩票业初兴。为了筹集社会福利资金、体育事业发展资金，社会福利彩票、体育彩票先后独立发展起来，并奠定了中国彩票业二元化发展的基本格局。2000年后，通过固定设点、联网发行的电脑彩票逐渐成为彩票市场的主流。彩票在网络化运行的同时，多省（区、市）乃至全国大力推动彩票联销、大奖统开，其中全国联销乐透型彩票逐渐成为全国销售的主力，使得彩票奖金，尤其是头等奖数额攀升，从而推动中国彩票业发展进入一个新的快速发展时期。此后，中国彩票销售年均增速大约在20%，远远超出其他产业的发展速度。2013年，中国彩票的销售总额已经达到3093亿元。中国的彩票销量排名跃居世界前列，发展成为当今世界彩票大国。

彩票业在规模实现扩张的同时，其发行销售方法、运营方式都在发生变革。伴随通信技术的进步、移动互联技术的发展，尤其是伴随着网络、智能手机的逐渐普及并进入人们的日常生活，彩票发行销售方式也出现变革，网络、手机有望成为彩票销售的便捷方式。同时，一些新彩票游戏方式开始出现，例如体育彩票开发出的足球彩票、福



利彩票开发出的视频彩票以及福彩和体彩各自推出的快频彩票游戏等。彩票购买的便利化以及彩票游戏玩法的增多等也为彩票销量增长奠定了基础。在彩票业发展过程中，彩票业的政府规制逐渐建立起来，并不断向规范化方向迈进。2009年《彩票管理条例》的颁布和实施，是我国彩票立法的历史性跨越，标志着中国彩票进入法治化管理时期。2012年《彩票管理条例实施细则》的颁布则进一步明确了彩票发行、销售及监管部门机构间的职能，使得彩票相关主体间职责更为清晰，相互关系更为协调，从而为彩票业的协调发展提供了法治保障。

当前，中国的经济社会现代化为中国彩票业的发展提供了良好机遇。但是，中国彩票业也面临着世界博彩爆炸、新技术变革带来的挑战，彩票业自身及其运行环境面临新的变革。因此，要综合施策来应对世界范围内的博彩爆炸，以新技术变革传统彩票运营方式，改善彩票业的运营监管体系，推动彩票业树立社会责任理念，应对非理性购买等问题，以推动中国彩票业的持续发展。

Abstract

The compiling of the *Blue Book of China Lottery Development Report Series* is organized by the YICAI Foundation Management Committee of the China Overseas – Educated Scholars Development Foundation. Being the first of the report series, this book consists of six parts: the general report; welfare lottery and sports lottery; lotteries in Hong Kong, Macau and Taiwan; social responsibilities of lottery; thematic research articles; and the appendix. By presenting a systematic analysis on China's lottery development since the founding the P. R. C. , the book reviews and summarizes the various related aspects and problems in China's lottery development, which is supposed to lay a foundation for the report series.

With the advancement of the reform and opening-up policy, the New China (mainland) lottery began to make its debut in 1980s and 1990s. In order to raise funds for social welfare and sports development, welfare lottery and sports lottery were developed independently, which laid a basic pattern for the dualistic structure of China lottery industry. Since 2000, lotteries sold through fixed stores and computers have gradually become the mainstream of lottery market. In line with network lottery marketing, interprovincial and national joint purchasing and marketing lotteries have been greatly promoted, in which big prizes are drawn and announced simultaneously. With national Lotto lotteries gradually being the sales force all over the country, the lottery winnings, especially the first prize awards, are keeping increasing. As a result, China's lottery industry has entered a new period of rapid development, with the average annual growth rate of sales nationwide being about 20%—far higher than that of other



industries. In 2013, the total amount of lottery sales in China has reached 309.3 billion Chinese yuan, leading the world in today's lottery sales.

During its scale expansion, lottery industry also saw changes in its issuance and marketing methods, as well as the operation mode. With the advancement of communication and mobile internet technology, especially the growing popularity of intelligent mobile phone—which has already entered into people's daily life, the sales methods of lottery witnessed great changes. Internet and mobile phones are expected to be convenient channels for lottery sales. Meanwhile, some new lottery games began to appear, such as football lottery derived from sports lottery, video lottery from welfare lottery, and the various instant games from both. The increasing game types and growing convenience of purchasing have facilitated the growth of lottery sales. In this process, government regulations on lottery industry were gradually enacted and standardized. The publication and implementation the *Lottery Management Regulations* in 2009 achieved a historic leap in lottery legislation in the country, marking the arrival of legalized management in lottery industry. The publication of *Rules for Implementation of Lottery Management Regulations* in 2012 further clarified the functions of agencies respectively responsible for lottery issuance, marketing and supervision. Thus, a better coordination among relevant agencies was ensured and a legal guarantee for the coordinated development of lottery industry was provided.

At present, China's economic and social modernization is providing a good opportunity for the development of its lottery industry. However, it is also facing the challenges of world gambling explosion and technological innovation, and the industry itself, as well as its running environment, is also expected to undergo new revolution. Therefore, comprehensive policies and measures should be applied to tackle the problem of worldwide gambling explosion, and traditional lottery running system should be innovated by using new technology. Besides, the industry needs to improve its operation regulatory system, foster the concept of social responsibility, and tackle the problem of non-rational purchase, so as to maintain the sustainable development of China's lottery industry.

目 录



B I 总报告

B.1 中国彩票发展的历程、前瞻及挑战

.....	付欣忱 马福云 荆宇虹 潘梓朝 张林江 王晓飞 / 001
一 导言	/ 002
二 彩票的界定及历史发展	/ 003
三 中国彩票的发展历程	/ 011
四 中国彩票的运营管理	/ 016
五 中国彩票发展中的挑战	/ 020
六 推动中国彩票业发展的政策建议	/ 031

B II 福彩体彩篇

B.2 中国福利彩票的发展与管理

.....	张增帆 崔 杰 郁 菁 / 039
-------	-------------------

B.3 2013 年度中国福利彩票发展分析

.....	王晓玫 张雅桦 宋 川 / 050
-------	-------------------



- B.4 中国福利彩票发展的挑战及应对
..... 阿江 王春莉 金奂亨 / 062
- B.5 中国体育彩票的发展与管理
..... 崔杰 杨贺 孙波 / 073
- B.6 2013年度中国体育彩票发展分析
..... 王晓玫 张雅桦 黄立鹏 / 084

B III 港澳台篇

- B.7 香港彩票发展报告
..... 何洁云(港) 黄承珮(港) 卢孝松(港) / 093
- B.8 澳门彩票发展报告
..... 曾忠禄(澳) 梁文润(澳)
陈玉雪(澳) 黄素钧(澳) / 115
- B.9 台湾彩票发展报告 刘代洋(台) 付钧水 / 134

B IV 社会责任篇

- B.10 中国彩票业及其社会责任 胡薇 刘五书 / 151
- B.11 中国彩票企业发展及展望
..... 樊义鹏 梁道兵 刘程萍 / 172
- B.12 中国责任彩票评估指标体系 马福云 荆宇虹 / 185

B V 专题研究篇

- B.13 世界彩票业发展及其对中国的启示 唐德龙 张莉 / 202