

Gambling Overview - US - 2022

Report Price: £3695 | \$4995 | €4400

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This report looks at the following areas:

- The market and forecast for gambling and key segments of casinos, lotteries and pari-mutuel betting
- Factors impacting the gambling market and consumer interest
- Key players in gambling, competitive strategies and market opportunities
- What types of bets consumers placed in the past year and their interest in future betting
- Casino-style gambling frequency and motivations for casino-style gambling
- Consumer attitudes toward gambling, casinos and barriers to gambling

Consumer spend on gambling dipped dramatically (22%) in 2020, driven by the 27% declines posted in the casino gambling segment. Casino shutdowns and pauses on sporting events curtailed betting opportunities, and the insecurity resulting from a global crisis and job losses led to cautious spending. But the industry made a quick recovery and posted record receipts in 2021, spurred by the expansion of sports betting largely via remote/digital platforms.

Two thirds of US adults aged 22+ placed bets in the past year. Lottery games (40%) are the most common bet, followed by sit-down gaming machines (22%). Interest in future gambling is high, including 38% of non-gamblers showing interest in gambling in the future. Casino card games experience the largest gap between current participation and future desire, followed by sit-down gaming machines, suggesting opportunity for casinos to rebuild an audience.

Money is the leading motivator for and deterrent to gambling. Finances are top-of-mind during a time of inflation, and consumers will look for items and experiences deemed worth the expense. Leaning into the entertainment aspects of gambling will appeal to those looking for escape and indulgence following years of pandemic-related restriction. In-person venues can boast experiential elements, such as hospitality and entertainment-related amenities. Online platforms can focus on gamification, enabling users a sense of



“The pandemic resulted in challenges and benefits to the US gambling industry. A steep decline in 2020 was quickly reversed as restrictions loosened and consumers warmed to virtual options – specifically sports betting – that capitalized on a well-timed expansion.”

– **Fiona O’Donnell, Senior Director – US Reports**

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accomplishment, even absent of financial gain. Lowering stakes by allowing small bets; enabling other chances to win (eg loyalty points for participation); and allowing for non-monetary, points-only play can keep gamblers engaged during lean times.



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