



VIXIO
**Regulatory
Intelligence**

**U.S. Sports Betting & iGaming
Outlook
2025 Preview**

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Notable Numbers

26.8

The anticipated size (\$26.75bn) of the U.S. online sports-betting and iGaming market by gross revenue in 2025, according to Vixio's U.S. Online Forecasting Dashboard. We project that the overall market will exceed \$41bn in total revenue by 2028, versus an estimated \$23.4bn in 2024.

1

The number of states that legalized sports betting in 2024, in line with Vixio's forecasts. Last year, we predicted that one of Georgia, Minnesota or Missouri would pass legislation and it was the latter state that did so when voters approved a Nov. 5 referendum by the thinnest of margins. In 2025, Minnesota is the most likely contender but approval of legislation for sports wagering is by no means a slam dunk.

6

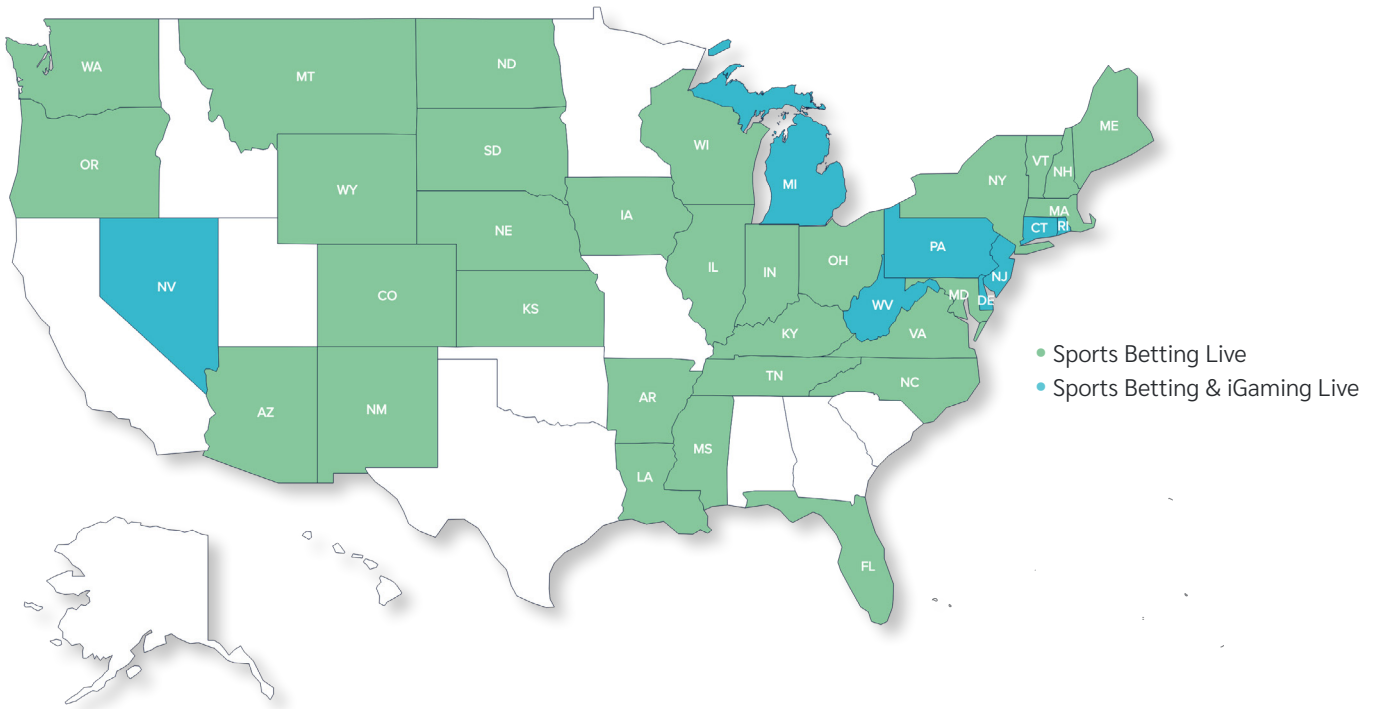
The number of states that considered iGaming legislation in 2024, with no state ultimately able to pass a bill. Legislation was approved by Maryland's House of Delegates only for the effort to die in the Senate, in part due to opposition from certain incumbent casino operators in the state. Vixio anticipates similar tough-going for iGaming expansion advocates in 2025, with up to ten states likely to consider legislation, but none are a clear contender to actually approve a bill, as things stand.

2.01

The size of New York's mobile sports-betting market in billions of dollars (\$2.088bn) in last-twelve month revenue through the end of November, with the Empire State becoming the first to cross the \$2bn LTM revenue threshold during the month of October. Mobile sports-betting markets in New Jersey, Illinois and likely Florida are also worth more than \$1bn in annual revenue per Vixio estimates, with New Jersey, Pennsylvania and Michigan each reporting more than \$2bn in annualized GGR from iGaming.

The State Of The States

December 2024



Post-PASPA

Legal Landscape

As of Dec. 1, 2024, sports betting is live or regulated in 39 states: **Arizona; Arkansas; Colorado; Connecticut; Delaware; District of Columbia; Florida; Illinois; Indiana; Iowa; Kansas; Kentucky; Louisiana; Maine; Maryland; Massachusetts; Michigan; Mississippi; Montana; Nebraska; Nevada; New Hampshire; New Jersey; New Mexico; New York; North Carolina; North Dakota; Ohio; Oregon; Pennsylvania; Rhode Island; South Dakota; Tennessee; Vermont; Virginia; Washington; West Virginia; Wisconsin; and Wyoming.**

Legislation has also been approved, but not yet implemented, in **Missouri**.

Full iGaming, including online casino games, is live in seven states: **Connecticut; Delaware; Michigan; New Jersey; Rhode Island; Pennsylvania; and West Virginia.** iGaming limited to online poker is live in **Nevada**. Meanwhile, iLottery programs are live in 12 states: **Connecticut; District of Columbia; Georgia; Kentucky; Illinois; Michigan; New Hampshire; North Carolina; Rhode Island; Pennsylvania; Virginia; and West Virginia.** iLottery legislation or regulations have also been approved, but not yet implemented, in **Massachusetts** and **New Jersey**.

The Big Numbers

31 States with live mobile sports betting

3 States where only online sports betting is offered

8 States where only retail sports betting is offered

7 States with online casino gaming

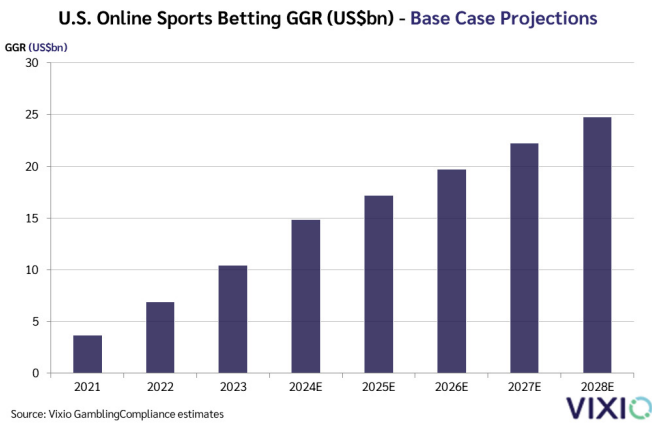
2025 Outlook

Market Forecasts

Below, we provide our projections on the expected size of the U.S. sports wagering and iGaming markets under different legislative scenarios.

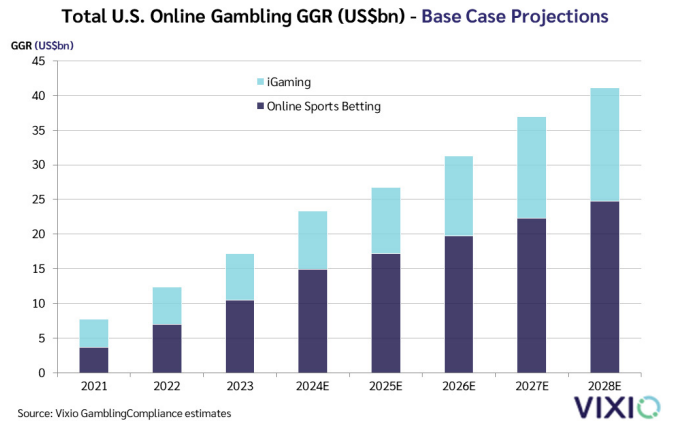
As of Dec. 1, we forecast the U.S. online sports-betting market to be worth **\$24.8bn to \$29bn** in total annual gross revenue by 2028, depending on whether legislative trends align with our base-case or (more optimistic) bull-case scenarios. We anticipate online net gaming revenue, after bonuses and other deductions, to reach **\$18.6bn to \$21.7bn** by 2028. Meanwhile, we forecast total gross revenue from all U.S. online gambling (online sports betting, plus iGaming in certain states) to reach **\$41bn to \$54.4bn** by 2028. As the market and regulatory landscape evolves, we will continue to challenge and update our estimates based on policy developments and hard data reported by states with lawful sports wagering.

U.S. Online Sports Betting Expansion ‘Base-Case’



Per [Vixio’s U.S. Online Forecasting Dashboard](#), we currently project the U.S. online sports-betting market to be worth \$14.9bn in gross revenue during 2024, before reaching \$24.8bn in 2028 under our revised “base-case” forecast, which assumes legal online sports betting will spread to 33 states. In our base-case forecast, New York will remain the largest U.S. market in 2028, followed by Florida, Illinois, New Jersey and Ohio, respectively. In our more optimistic “bull-case” scenario, revenue could reach \$29.0bn in 2028, fuelled by further legalization in Texas, Georgia, Mississippi, Oklahoma and Washington State.

U.S. iGaming Expansion ‘Base-Case’



We currently forecast the total U.S. online gambling market (mobile sports betting, plus iGaming) to be worth approximately \$26.8bn in gross revenue in 2025, rising to as much as \$41.0bn by 2028 under our “base-case” scenario. Total iGaming revenue is projected to rise from \$9.6bn next year to more than \$16.2bn in 2028. Although we believe that no state currently has an entirely clear path to legalizing iGaming, we anticipate under our “base-case” that expansion will continue at a rate of around one state every other year, with Illinois and Maryland among the likelier candidates within the next few years.

For the latest from Vixio GamblingCompliance’s suite of intelligence on the U.S. sports betting market includes customizable market forecasting, state-by-state legal and compliance guides, trackers to monitor partnerships and new regulations, timely analysis of the latest policy and market trends and exclusive interviews with key regulators and executives, view the **U.S. Sports Betting hub**, under the In Focus tab at gc.vixio.com, or [click here](#).



2025 Outlook

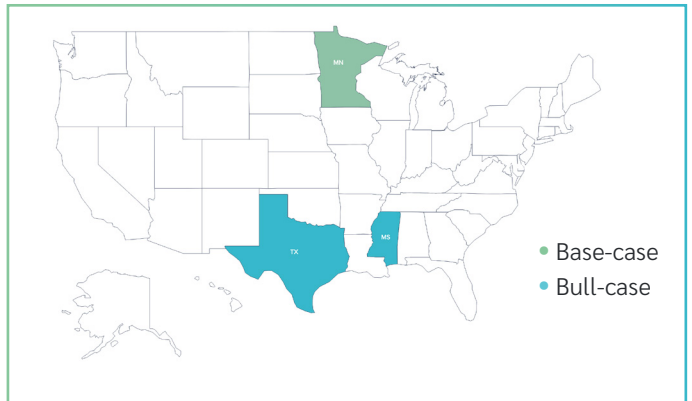
Sports Betting

2025: What We're Watching For. As sports-betting markets continue to mature, and with only a handful of holdout states remaining that feature no legalized betting, in our view the focus for 2025 will remain on the potential for legislative and regulatory restrictions, both at the state and federal level. Responsible gaming continues to be a major focus, with states looking for more creative solutions to curtail problem gambling, and potentially looking to European jurisdictions to borrow ideas. In terms of new state legalization, many of the states that have yet to legalize continue to have major roadblocks in the way of doing so. While Minnesota stakeholders appear to be the closest to working through their differences, even a more optimistic projection would likely only see one or two more states finally breaking through.

Outlook: Sweepstakes Spark. 2024 saw an inflection point in the burgeoning sweepstakes sportsbook space. Buoyed by the success of Fliff, several companies that struggled to make a dent in the regulated sports-betting market and were only able to launch in a handful of states instead launched sweepstakes offerings in upwards of 40 states. Novig and Prophet Exchange were the early adopters of such a pivot, and given how consolidated the regulated industry has become around market leaders FanDuel and DraftKings, it's certainly possible that others may follow their lead. Companies with other regulated gaming operations may not be among those who follow, fearing that a future adverse legal ruling on the legality of sweeps could put their licenses at risk, but the sweepstakes space may be more appealing to those who are either pure sports-betting plays, or a purely online offering without an established presence in the U.S. to date.

Outlook: Tax Increases. Another area to watch in 2025 is the looming threat of sports-betting tax hikes, following in the footsteps of key states such as Ohio and Illinois. Other states certainly have noticed the trend, and more importantly, that operators remain willing to pay the higher bill despite publicly grumbling. Although operators will push for online casino gaming as part of any proposed sports-betting tax hike, raising rates on sports betting could be a quick and easy way for states to fill a small budget gap in 2025, and one that is unlikely to ruffle many feathers among constituents. States that are most at risk for increase are likely ones that passed industry-friendly single-digit tax rates in 2018 and 2019, as well as larger states where operators are less likely to depart following a modest increase.

Where We Expect Sports-Betting Legislation to be Approved in 2025



Five Policy Points To Watch

- » **Offshore crackdown:** Bovada received a number of letters in 2024 from state regulators ordering them to cease operations in the state, and ultimately complied with many. Will more states follow suit? Will regulators target other offshore operators? And, will those operators be as swift in complying as Bovada has?
- » **Fantasy sports:** Although some of the furor regarding pick'em style daily fantasy sports has died down as prominent operators, such as PrizePicks and Underdog, have tweaked their products, a revised definition of fantasy sports will likely be part of many bills to either legalize or modify sports betting.
- » **Player limits:** The practice of limiting successful players has raised some eyebrows as regulators receive complaints from so-called "sharp" bettors. Sportsbooks have maintained the practice affects a small fraction of players, but some have also said in financial documents that limitations on such a practice would have an impact on their business.
- » **Sport integrity:** Following a year that included the most prominent U.S. athlete-involved scandal in decades, leagues remain on high alert to preserve sport integrity, and further measures to limit concerning bet types could be on the agenda in 2025.
- » **The enforcement environment:** Regulators have been more aggressive in issuing fines to operators, including a ramp-up from the New Jersey Division of Gaming Enforcement, an agency that many around the country look up to. Could other regulators follow suit with a stricter enforcement model?

2025 Sports-Betting Expansion

States To Watch

Minnesota

While legislators were unable to get a package to legalize sports betting in the waning days of the state's 2024 legislative session, representatives of many of the major stakeholders involved, including both Indian gaming tribes and racetrack operators, came away believing they had the framework of an agreement in place that was amenable to all sides. Those parties have retained cautious optimism heading into 2025 that the basic structure of the deal, which included exclusive rights for tribes to operate mobile betting and charitable gaming and racetracks receiving a cut of the tax revenue collected from betting, will remain intact heading into the new session. Notably, the proposal also contained stronger responsible gaming protections than most U.S. jurisdictions to date, by prohibiting push notifications while an app is inactive except in cases of fraud alerts, while also preventing players from using deposited funds until at least three hours after a deposit is made.

Obstacles: Stakeholder disputes, tribal gaming issues

2025 session: Jan. 14 – May 19

Alabama

Sports-betting legalization was part of a significant gaming expansion package that cleared the state's House of Representative in Feb. 2024 before running into a roadblock in the Senate, where a stripped-down version of the bill that did not include sports wagering was passed in hopes of reaching a compromise. That compromise did not materialize, and the topic of gaming expansion is likely to re-emerge in 2025. Sports betting is not the headline issue in the proposal, as discussions also include new casinos, reforming existing gaming types and creating a state lottery in one of the only five U.S. states that doesn't have one. The scope of the overall expansion in a state where regulated gaming is limited makes passage more complicated, and even if a plan does move forward, the previously established willingness to remove sports betting from the legislation could be a harbinger of things to come. Sports betting could also be used as a bartering chip by both sides of the conversation to extract further concessions, one way or another. After a rollercoaster ride in 2024, in our view the outlook likely isn't great for sports betting legalization in 2025, but it's not completely off the table either.

Obstacles: Other gaming issues, referendum requirement

2025 session: Feb. 4 – May 15

Texas

Supporters have already begun their lobbying efforts ahead of Texas's 2025 legislative session to legalize sports betting in one of the two largest prizes remaining on the map, but the problems that existed in previous efforts remain. Lt. Gov Dan Patrick, a staunch opponent of legalized betting, has maintained that gambling expansion will only be brought to the floor of the state's Senate if the plan has the support of a majority of Republicans in the Senate, and that level of Republican support remains highly unlikely. The House of Representatives was supportive in 2023 of legislation to amend the state's constitution to permit sports betting, as well as a separate measure to authorize integrated-resort casinos, but the Senate remains a massive hurdle for supporters to clear. There will be a lot of noise about any conversation or any bit of progress in the Lone Star State until supporters can figure out a way to garner support in the Senate.

Obstacles: Conservative legislature, referendum requirements

2025 session: Jan. 14 – June 2

Georgia

The prospects for sports betting in Georgia may be bleaker in 2025 than any other year in recent memory, after another failed effort to amend the state's constitution in 2024. The Peach State has been a persistent bugaboo for sports betting supporters, with at least five straight years of attempts where legislation failed to cross the finish line. A sports betting package cleared the Senate in February, but stalled in the House for almost two months before a last-ditch effort to bring the bills to floor failed. State lawmakers have consistently differed on whether sports betting requires a constitutional amendment or merely standard legislation, and given that amendments require voter approval in even-numbered year elections, any 2025 effort will likely have to involve the standard legislation route. Additionally, after the razor-thin vote in Missouri to legalize sports betting, an affirmative vote is almost certainly not a sure bet in Georgia. Given the number of failed attempts and relatively limited progress over that time period, in our view, it's difficult to hold much optimism for the state's prospects without seeing some sort of major turning point.

Obstacles: Conservative legislature, referendum requirement

2025 session: Jan. 13 – Apr. 3

Mississippi

While the Magnolia State was one of the first to adopt land-based sports betting in 2018, it has yet to adopt mobile sports betting, and the most serious effort to do so, which took place during 2024's legislative session, failed to clear the state's legislature. The House moved quickly to adopt legislation in February that would grant each of the state's casinos one mobile skin, following a series of meetings by a task force of legislators and gaming stakeholders. However, the measure failed to muster support in the Senate, which kept the issue alive by passing a shell bill to send the matter to a conference committee, but concerns over cannibalization of casino revenues stopped the bill in its tracks. Those concerns are likely to continue into 2025, as smaller independent casinos remain opposed to the plan, fearing not just cannibalization of land-based sportsbook revenues, but also that mobile sports betting is simply the first step toward online casino gaming.

Obstacles: [Cannibalization concerns](#)

2025 session: [Jan. 7 – Apr. 6](#)

California

After all sides opted to sit out the 2024 election following a brutal and costly ballot battle in 2022 that became the most expensive referendum campaign in American history, tribal leaders say they are beginning discussions on what the framework would look like to mount another effort to legalize sports betting in the state, with an eye toward the 2028 election. Major commercial operators such as FanDuel and DraftKings have attempted to mend fences with California tribes following their 2022 defeat, and are unlikely to pursue their own effort again without tribal support. As such, the state will likely remain in a holding pattern on the sports betting front as tribes plan their next move. One variable to watch, in California in particular, may be the emerging popularity of sweepstakes sports-betting offerings, which tribes have begun to take notice of and are looking to quash through enforcement measures. If those measures fail to take hold, an alternative strategic option for tribes could be a swifter effort to launch their own platforms.

Obstacles: [Tribal gaming issues](#)

2025 session: [Dec. 2 \(2024\) – Sep. 12](#)

2025 Outlook

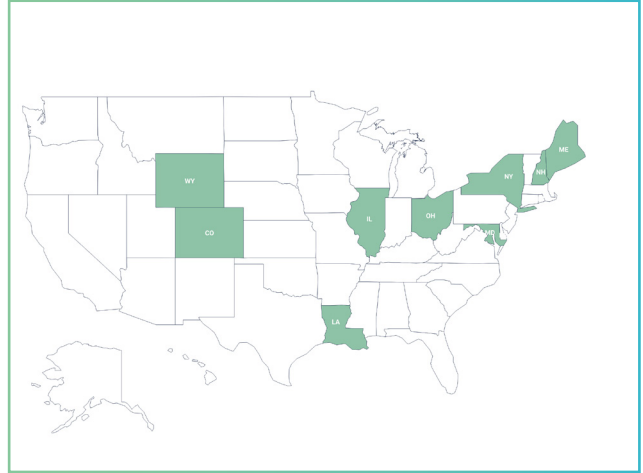
iGaming

2025: What We’re Watching For. iGaming advocates rolled snake eyes in terms of expansion to new states in 2024 and that is the most likely outcome again in 2025, in our view, with iGaming now facing stronger resistance than at any other time in recent years amid entrenched opposition from a wider group of casino operators, unions and others. Negative headlines related to sports betting, problem gambling and advertising saturation are also a headwind that will only blow stronger for the foreseeable future. Instead of opening new markets, supporters may look at 2025 to be a year of incremental gains by putting bills in play in new states such as Colorado and Louisiana, and by neutralizing opposition elsewhere, to position iGaming for success in 2026 and beyond when states are projected to be in worse shape from a budgetary perspective.

Outlook: Sweepstakes In The Spotlight. There is little doubt that sweepstakes casino platforms will be the hot topic of 2025, amid escalating legal and lobbying pressures against the online casino-like platforms that operate outside the constraints of state and federal gambling laws. Further lawsuits are inevitable and formal enforcement actions by state authorities are highly likely, as sweepstakes companies are forced to battle both opportunistic litigants and strident opposition from the regulated gaming industry. It would be no surprise if statutory prohibitions on sweeps are folded into iGaming bills supported by industry groups. Among other things, we will be watching for whether new legislative restrictions are also discussed at state level on a standalone basis, similar to how sweepstakes cafes were banned in various states in the early 2010s

Outlook: iLottery. After Connecticut, North Carolina and West Virginia all launched interactive lottery platforms in 2024, Massachusetts should be the next cab off the rank thanks to iLottery provisions included in the state’s FY2025 budget law—although officials are not expecting to go live until 2026. Expansion of iLottery has encountered similar challenges to iGaming amid opposition by traditional lottery retailers fearful of cannibalizing the sale of paper tickets. As such, look for no more than one or two further states to move forward in 2025. A related front to watch is the increasingly competitive market for online lottery couriers, where the likes of DraftKings-owned Jackpocket seem set to face a high-stakes lobbying battle over whether couriers should be regulated or prohibited in the key Texas market. Virginia and Wisconsin have already taken the latter route — but that was several years ago, before couriers attracted major investment and the higher profile they enjoy today.

Where We Expect iGaming Legislation to be Considered in 2025



Ongoing Obstacles To iGaming Expansion

- » **Cannibalization concerns:** The impressive revenue growth of iGaming is proving to be a double-edge sword, on the one hand underlining the potential fiscal benefits for states but simultaneously amplifying concerns among casinos and other traditional gaming interests that their businesses may lose both customers and revenue to online platforms if they are legalized.
- » **Union opposition:** In battleground states such as New York and Maryland, cannibalization concerns have spread beyond casinos to union groups who represent casino workers fearful that any erosion in land-based revenue will lead to job losses or lower wages.
- » **The dominant duo:** Casinos and other incumbents are increasingly skeptical as to how much they will benefit from iGaming relative to the dominant duo of FanDuel and DraftKings who are cleaning up when it comes to online sports betting.
- » **Budgetary needs:** Federal relief funds have left states flush with cash since 2020, although the end of those pandemic-era programs, combined with declining tax revenues, means budgetary surpluses are now turning to deficits in various states.
- » **Referendum wrinkles:** Enactment of legislation in Colorado, Maryland and Louisiana (among other states) would require approval via a voter referendum, for which there is no direct precedent in an iGaming context.

2025 iGaming Expansion

States To Watch

New York

The Holy Grail of U.S. iGaming begins 2025 in essentially the same position as it did 2024. The dominant gaming issue for the year is set to be the slowrolling process to license three casino-resorts in or around New York City and it is hardly helpful for iGaming boosters that at least two of the bidders on those licenses have questioned whether they would still be able to invest billions of dollars in a project were online casinos approved. The cannibalization concerns of union groups representing gaming workers also have yet to be assuaged, while another structural challenge is how to align iGaming with NY's high-tax and lucrative mobile sports betting market. If iGaming is going to be approved, it would most likely be as the solution to a specific budgetary problem, offering the possibility of \$1bn+ in taxes within the first year, plus many millions more in upfront licensing fees.

Obstacles: Other gaming issues, cannibalization concerns, union opposition

2025 session: Jan. 8 - June 13

Florida

After a successful relaunch of the Hard Rock Bet online sportsbook and several successful legal and regulatory developments in 2024, senior officials with the Seminole Tribe of Florida's gaming arm have made it clear that the tribe would be very interested in a conversation about extending its monopoly to include online casino games across the Sunshine State. The Seminole's formidable clout in Tallahassee makes Florida a state to watch, although it's unlikely that a landmark 2021 gaming compact will be revisited and expanded as soon as 2025, in our view. Recall, the initial version of that compact would have mandated the state and the tribe to enter into negotiations over iGaming after a period of three years, before the provision was removed by lawmakers on day one of a special legislative session to ratify the agreement. That can be taken as evidence of the heightened opposition among other Florida gaming stakeholders to allowing the Seminole Tribe to offer digital casino games on a state-wide basis.

Obstacles: Tribal gaming issues, gaming stakeholder disputes

2025 session: Mar. 4 - May 2

Illinois

Although Illinois' land-based casinos and mobile sports-betting operators are set to lobby again for iGaming in 2025, opposition from the state's other major gaming interest — operators of video gaming terminals (VGTs) in bars and other venues — remains a formidable, if not insurmountable obstacle. VGTs now generate significantly more state and local tax revenue than casinos and also keep the lights on in many hundreds of small businesses across the Prairie State, giving VGT interests a powerful voice in Springfield. If there is a cause for optimism, it is Illinois' track record of turning to gambling expansion in times of budgetary need. iGaming bills may not have advanced in either the House or Senate in recent years but it should be noted that the regular process is not how successful gaming bills of years moved forward either, with a late-breaking deal in the waning hours of the regular session in May or during an abbreviated "veto" session in November the likelier path.

Obstacles: Cannibalization concerns, gaming stakeholder disputes

2025 session: Jan. 8 - May 31

Louisiana

The Pelican State is in play for iGaming expansion in 2025, after the Louisiana Senate approved a resolution in June 2024 that requires a committee to study the issue and issue a report to lawmakers by Mar. 1, or around six weeks before the 2025 regular session kicks off. The Louisiana legislature is typically active when it comes to gaming matters and an iGaming bill is at least likely to be introduced next year. Still, strong opposition can be expected from operators of video poker terminals as well as from pockets of the state's incumbent casino industry, while proponents may also have their hands full deflecting an overlapping revenue-raising initiative to increase taxes on online sports betting. Another obstacle is the fact that iGaming expansion would require a parish-by-parish referendum just like sports betting and fantasy sports. That means any future market for online casinos would inevitably be fragmented and remain off-limits in at least some parts of the state.

Obstacles: Other gaming issues, gaming stakeholder disputes, referendum requirement

2025 session: Apr. 14 - June 12

Maryland

Maryland made material progress on iGaming in 2024 when a bill was approved by the state's House of Delegates by a comfortable margin. The bill did not move forward in the Senate, however, with proponents unable to overcome stiff opposition from at least two of the state's six casino operators, including Baltimore-based Cordish Companies. Union workers also voiced clear opposition to iGaming and remain a key obstacle going forward. It remains to be seen whether legislation will be formally reintroduced in 2025, given that any bill would also need to be approved via a state-wide referendum and such a referendum now cannot be held until Nov. 2026, at the earliest. Legislators who support iGaming may instead look to keep their powder dry for 2026 and hope that stakeholder tensions over online casinos can be soothed in the meantime.

Obstacles: Cannibalization concerns, union opposition, referendum requirement

2025 session: Jan. 8 - Apr. 7

Colorado

2025 could be the year that legislation for iGaming is put on the table in Colorado, after many months of discussions involving incumbent casino and sports betting operators as well as state officials. Without having actually considered a bill before, time will tell whether there is sufficient support among the legislature to actually pass iGaming. Even if a bill can make it past lawmakers, it would also need to be put before voters in a state-wide referendum. A referendum on sports betting was approved by the narrowest of margins in 2019 and, although the confusing language of that specific initiative may have been a factor in reducing support, it can be presumed that online casino games would be at least somewhat less popular at the ballot box with everyday voters compared to sports wagering.

Obstacles: Cannibalization concerns, referendum requirement

2025 session: Jan. 8 - May 7

Wyoming

An iGaming bill is set to be reintroduced in Wyoming in 2025 in the wake of a formal study on gambling reforms that was delivered to the state's gaming commission in late 2024. That study concluded iGaming would not "cause an erosion" of revenue from existing forms of gaming in the state, namely tribal casinos and historical horseracing terminals. Still, it did caution that "the ordinary growth" of those offerings could be restricted and it remains to be seen whether incumbent gaming operators in Wyoming are as enthusiastic about iGaming as the state's licensed online sports betting platforms. The Cowboy State may not be the most obvious contender for online casinos or set pulses racing on Wall Street, but it did move quickly and efficiently on mobile sports betting in 2021 and is a dark horse for iGaming in 2025.

Obstacles: Cannibalization concerns, tribal gaming issues
2025 session: Jan. 14 - Mar. 7

Others

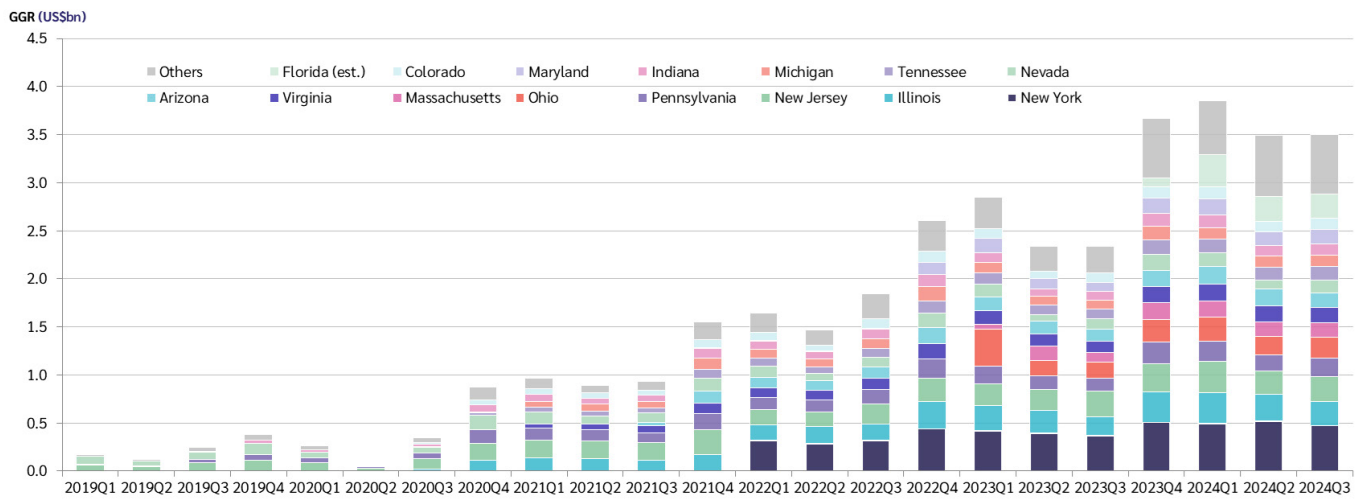
After the **New Hampshire** Senate passed a bill in 2023, iGaming is likely to be back on the table in 2025. Major obstacles include opposition from charitable casinos and an overlapping discussion on allowing slot machines at their venues, plus the inevitable challenge of steering any controversial bill through the vast 400-member NH House of Representatives. **Ohio** is also likely to see legislation reintroduced, but local hero casino operator JACK Entertainment is opposed and Gov. Mike DeWine is no fan of gambling in general. Sports-betting operators have highlighted **Virginia** as a further state to target, although a short legislative session and a much bigger lobbying battle over illegal gaming machines makes approval of some kind of study bill a more realistic best-case scenario for 2025. Advocacy efforts in **Indiana** have gone into reverse since at least 2023, with a lobbying scandal associated with a 2019 casino bill leaving gaming matters a non-starter in general. Meanwhile, discussions will resume in **Arkansas** over whether the state's existing gaming regulations (which were copied from Nevada) could be amended by the Arkansas Racing Commission to authorize interactive gaming on casino games without legislative action.

Data Analysis

Sports Betting

Below, we analyze revenue trends and other data reported by regulated sports wagering markets.

United States: Quarterly Sports Betting Gross Revenue (US\$bn) - 2020Q4 to 2024Q3



Source: State regulators *Data excludes unreported tribal sports betting revenue

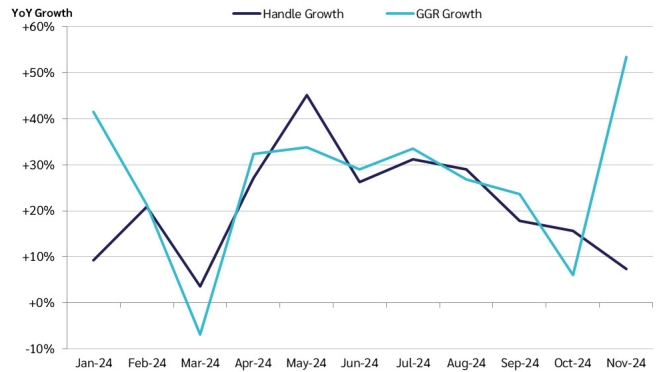
State	Latest Reporting Period	TTM Sports Wagering Revenue (US\$)	TTM GGR per Capita	TTM GGR Growth	TTM Handle Growth
New York	November	2,088,250,936	106.7	+27%	+20%
Illinois	September	1,177,544,509	93.8	+21%	+24%
New Jersey	October	1,118,145,469	120.3	+15%	+18%
Florida (est.)	October	1,020,000,000	N/A	N/A	N/A
Ohio	October	888,294,643	75.4	N/A	N/A
Pennsylvania	October	774,909,253	59.8	+14%	+15%
Arizona	September	681,616,682	91.7	+24%	+18%
Virginia	October	655,657,247	75.2	+17%	+26%
Massachusetts	October	641,501,057	91.6	N/A	N/A
Maryland	October	611,713,305	99.0	+16%	+37%
Tennessee (est.)	October	557,656,504	78.3	+19%	+23%
North Carolina	November	547,927,961	N/A	N/A	N/A
Nevada	October	499,721,000	156.4	+5%	-4%
Michigan	October	492,455,747	49.1	+16%	+18%
Indiana	October	467,964,303	68.2	+15%	+20%
Colorado	October	458,804,563	78.1	+14%	+17%
Louisiana	October	457,399,369	100.0	+56%	+35%
Kentucky	October	275,499,741	60.9	N/A	N/A
Iowa*	November	231,447,271	72.2	+20%	+17%
Kansas	October	215,712,335	73.4	+27%	+28%
Connecticut	October	214,862,482	59.4	+24%	+28%

*Iowa revenue is reported net of promotional credits. Table is limited to state markets with >\$100m in TTM revenue. Table is limited to state markets with >\$100m in trailing 12 months (TTM) revenue.

New York Posts GGR Record In November

The New York sports-betting market achieved dual records in headline revenue and year-on-year growth in November, with GGR soaring by 53.5 percent to a record high \$232.2m despite handle growth slowing to its lowest rate since March. The state’s hold rate swelled to 10.2 percent from a year-to-date low of 7.6 percent in October and 7.1 percent a year prior, more than making up for a fourth consecutive deceleration in online handle growth to 7.1 percent. New York’s strong November result bodes well for the Q4 growth prospects of the broader U.S. sports-betting market after a challenging October, though a sustained moderation in handle growth in the second half of 2024 may raise doubts over whether the \$2bn+ Empire State market can maintain 20-plus percent revenue growth in 2025.

New York: YoY Online Sports Betting Handle & GGR Growth - Jan, 24 to Nov, 24



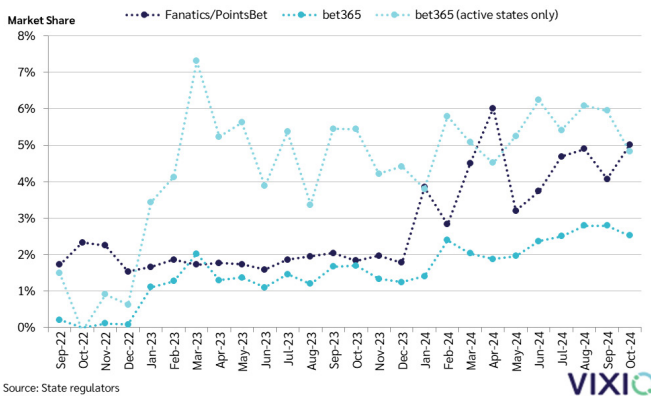
Source: NYS Gaming Commission



Fanatics And bet365 Challenge For Podium Positions

One feature of the early months of the 2024 NFL regular season has been the continued steady market share accretion of challenger brand Fanatics. The apparel giant’s sportsbook arm sat narrowly behind third-placed BetMGM in states including Pennsylvania, Indiana and Maryland during October and captured podium positions in the lucrative markets of New York and Illinois in October and September respectively. The traditional FanDuel-DraftKings-BetMGM upper order has also failed to take hold in Ohio and Kentucky, newer markets in which global betting giant bet365 has cemented a bronze medal position since the start of the year. This pair, each of which have also carved out respectable shares in the six-year-old New Jersey market, will be seeking to increase their overall U.S. market shares towards high-single-digit territory in 2025, building on a raft of successful state-level launches in 2023 and 2024.

Fanatics & bet365: U.S. Online Sports Betting Market Shares - Sep, 22 to Oct, 24



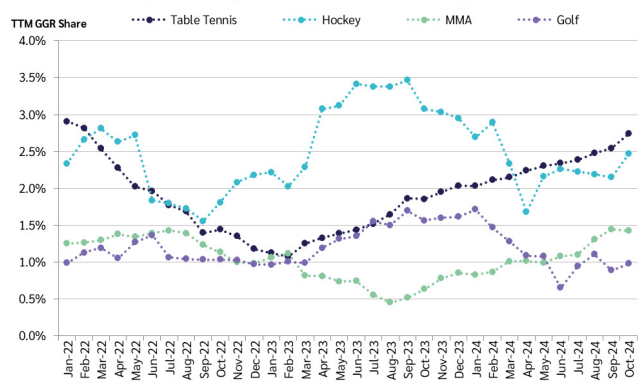
Source: State regulators



Table Tennis Betting On The Rise In Colorado

Table tennis, previously a standout post-quarantine betting driver in 2020, has steadily increased in prominence in Colorado’s betting mix over the last 18 months. Table tennis drove 2.7 percent of Colorado sportsbook GGR in the year to October 2024, more than doubling from an equivalent 1.2 percent in calendar 2022 and overtaking hockey to become the state’s sixth largest sport by GGR. More strikingly, monthly data from Oregon’s DraftKings monopoly has shown the sport reaching double-digit shares of state-wide revenue in August and October, underlining the (re)emergence of table tennis as a VIP micro-betting favorite during a year in which DraftKings has touted its focus on high frequency in-play markets as a point of differentiation in the age of the same game parlay.

Colorado: TTM Sports Betting Revenue Shares by Selected Sport - Jan, 22 to Oct, 24



Source: Colorado Department of Revenue

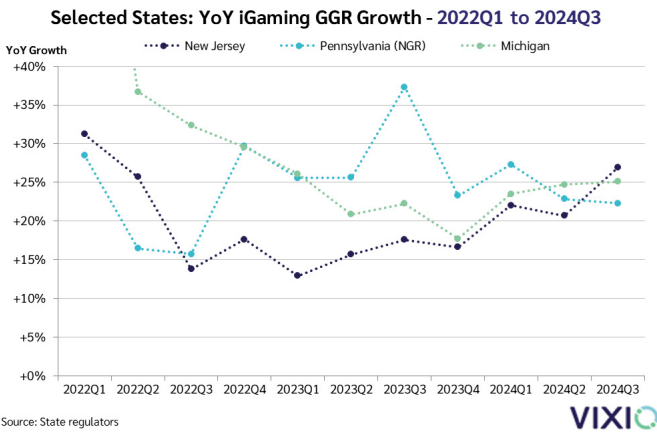


Data Analysis

iGaming

U.S. iGaming Growth Accelerates In 2024

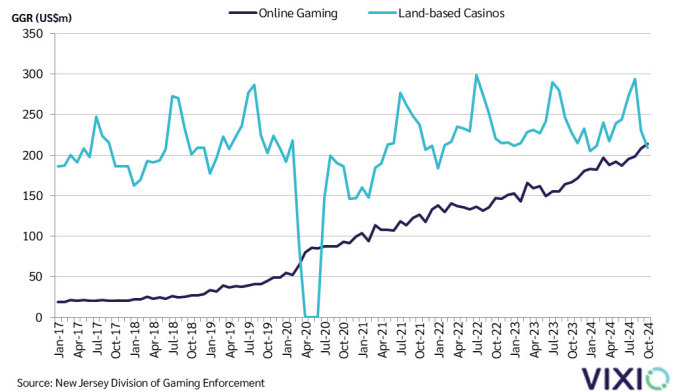
Total reported U.S. iGaming revenue grew by 26.9 percent year-on-year to \$6.37bn across the first 10 months of 2024, improving upon overall growth of 22.9 percent in 2023. Year-on-year growth peaked at 33.2 percent in February but also surpassed 30 percent in July, August and October, most recently energised by betting-to-gaming cross-sell that was boosted by customer-friendly sports results during the second month of the 2024 NFL regular season. The year-to-date acceleration has been most pronounced in the now 10-year-old New Jersey market, where growth has accelerated to 25-28 percent since June from a general pattern of mid-to-high-teens expansion between the summers of 2022 and 2024. Growth has also picked up meaningfully in Michigan, where monthly GGR has surpassed \$200m three times this year, and West Virginia, complemented by incremental contributions from monopoly operations in Delaware and Rhode Island.



New Jersey Online Gaming Overtakes Land-Based Casinos

New Jersey online casinos overtook their land-based equivalents by GGR for the first time under non-pandemic conditions in October, with online gaming GGR climbing by 28.1 percent year-on-year to \$213.6m amid an 8.5 percent dip in land-based gaming revenue to \$208.7m. While the rollout of iGaming in major gaming states New Jersey, Pennsylvania and Michigan has proven to be significantly expansionary in overall revenue terms, the handful of states to have legalized iGaming have slightly lagged the wider U.S. commercial casino market in land-based growth terms since the onset of COVID-19 nearly five years ago. These twin phenomena have provided fodder for studies arguing both sides of the cannibalization debate and remain one of the lobbying hurdles for struggling iGaming legislative efforts in states such as New York and Illinois.

New Jersey: Online vs Land-Based Casino GGR (US\$m) - Jan, 17 to Oct, 24



Slot Bonusing On The Rise In Pennsylvania

Promotional intensity in the Pennsylvania online casino market, as measured by a slot promo to GGR ratio which is calculated as the delta between wagers received minus payouts and reported NGR, rose to record highs during the early months of the 2024 NFL season. Having oscillated between a narrow range of 20-26 percent during 2022 and 2023, the market-wide ratio ticked up to 27.8 percent in September and 28.5 percent in October amid a significant increase from Penn National sub-licensees including DraftKings, BetMGM and Fanatics. This group exhibited a significantly heightened slot promo to GGR ratio of 30.6 percent in October versus 26.2 percent in September and 20.7 percent a year earlier, overtaking the promotionally aggressive FanDuel in this respect for the first time since May 2023 and hinting at the stubbornly high levels of bonusing prevailing across the broader U.S. iGaming market.

Pennsylvania: Est. Ratio of Slot Promo Credits to GGR - Jan, 21 to Oct, 24

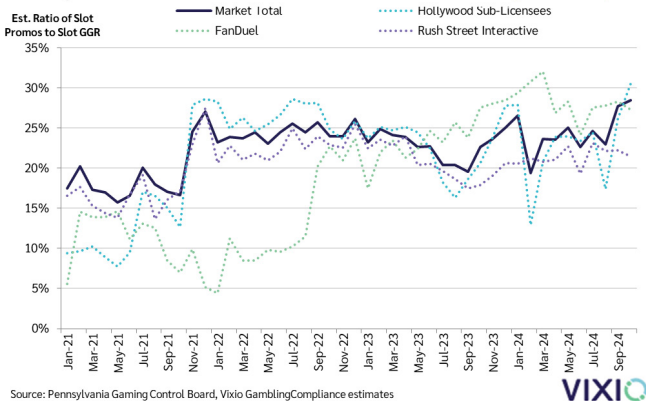


Table: States With Legal Sports Wagering

The table below highlights states that have enacted sports wagering laws and are in various phases of implementing their regimes. We note, however, that the laws of several states may be amended in the future. For example, a 2018 Rhode Island law restricted sportsbooks to land-based casinos, but legislation to authorize online wagering was later enacted in March 2019. The table does not include additional states where existing statutes could be construed to allow wagering as an authorized form of casino gaming or lottery product. Nor does it include the handful of states where Indian tribes might be able to launch sportsbook operations under the current terms of their gaming compacts.

State	Enabling Law	Regulations	Launch Date	Regulator	Who Can Operate?	Permitted Delivery Channels	No. Online "Skins" Per Licensee/ Total	Effective Tax Rate** (%)	Upfront Operator Licensing Fee	Notable provisions
AZ	HB 2772 (2021), Gaming Compact (2021)	Here	9/9/2021	AZ Dept. of Gaming	Tribes; Major league sports teams/facilities; Racetracks	Land-based and online	2/40	8 GGR (Land-based); 10 GGR (Online)	\$750k	Must share real-time betting data with leagues
AR	Issue 4 (2018)	Here	7/1/2019	AR Racing Commission	Casinos	Land-based and online	2/8	13-20 GGR	N/A	N/A
CO	HB 1327 (2019)	Here	5/1/2020 (Online); 6/18/2020 (Land-based)	CO Gaming Control Commission	Casinos; Tribes	Land-based and online	1/33	10 GGR	\$2k	No prop bets on college sports; leagues may request wagering restrictions
CT	HB 6451 (2021)	Here	9/30/2021 (Land-based); 10/12/2021 (Online)	CT Lottery Corporation / Commissioner of Consumer Protection	Tribes; Lottery	Land-based and online	1/3	13.75 GGR	N/A	No wagering on CT colleges
DC	Bill 22-944 (2019)	Here	8/3/2020 (Land-based); 5/28/2020 (Online)	DC Chief Financial Officer	Lottery; Sports arenas; Private facilities	Land-based and online (lottery); Land-based and on-premises mobile (sports arenas/private facilities)	N/A	10 GGR	\$500k (Sports arenas); \$100k (Other facilities)	Operators must employ an integrity monitoring system; no wagering on events involving DC based colleges
DE	HB 100 (2009)	Here	6/5/2018 (Land-based); 12/27/2023 (Online)	DE Lottery	DE Lottery via online operator, casinos and retail outlets	Land-based and online	N/A	50 GGR***	N/A	N/A
FL	SB 2-A (2021); Compact (2021)	Forthcoming	11/8/2023 (Mobile); 12/7/2023 (Land-based)	Tribal Gaming Commission / FL Gaming Control Commission	Seminole Tribe	Land-based and online	N/A	10-15.75 GGR	\$600k	No prop bets on college sports

Table: States With Legal Sports Wagering (cntd)

State	Enabling Law	Regulations	Launch Date	Regulator	Who Can Operate?	Permitted Delivery Channels	No. Online “Skins” Per Licensee/ Total	Effective Tax Rate** (%)	Upfront Operator Licensing Fee	Notable provisions
IL	SB 690 (2019)	Here	3/9/2020 (Land-based); 6/18/2020 (Online)	IL Gaming Board; IL Lottery	Casinos; Racetracks; Sports arenas; Online operators; IL Lottery	Land-based and online	1/23	15 GGR (General); 17 GGR (Cook County)	\$10-20m	Betting on IL collegiate sports prohibited; must share real-time betting data with leagues
IN	HB 1015 (2019)	Here	8/30/2019 (Land-based); 10/03/2019 (Online)	IN Gaming Commission	Casinos; Racinos; OTBs; Tribes	Land-based and online	3/39	9.5 GGR	\$100k	College wagering limited to NCAA Div. I; in-play college prop bets prohibited; comm. can disapprove of the source of data used
IA	SF 617 (2019)	Here	8/15/2019 (Land-based and online)	IA Racing and Gaming Commission	Casinos; Racetracks	Land-based and online	3/57	6.75 GGR	\$75k	No prop bets on IA college athletes
KS	SF 84	Here	9/1/2022	KS Lottery /Racing & Gaming Commission	Casinos	Land-based and online	3/12	10 GGR	N/A	N/A
KY	HB 551	Here	9/7/2023 (Land-based); 9/28/2023 (Online)	Kentucky Horse Racing Commission	Racetracks	Land-based and online	3/27	9.75 GGR (Land-based); 14.25 GGR (Mobile)	\$500k	A sports governing body may request the commission to exclude wagering on certain events
LA	SB 247 (2021); HB 697 (2021)	Here	10/6/2021 (Land-based); TBD (Online)	LA Gaming Control Board	Casinos; Racetracks	Land-based and online	2/40	10 GGR (Land-based); 15 GGR (Online)	\$500k	N/A
MD	HB 940 (2021)	Here	12/9/2021 (Land-based); 11/23/2022 (Online)	MD Lottery and Gaming Commission	Casinos; Racetracks; Sports stadiums; Select gaming entities; Online operators	Land-based and online	1/60	15 GGR	\$500k-\$2m	Leagues / colleges may restrict wagering
ME	LD 585	Here	11/3/2023 (Online)	Maine Gambling Control Unit	Tribes; Casinos; Racetracks; OTBs	Land-based and online	1/4	10 GGR	\$200K	Betting on ME collegiate sports prohibited
MA	HB 5164	Here	1/31/2023 (Retail); 3/10/2023 (Online)	MA Gaming Commission	Casinos; Racing facilities; Online operators	Land-based and online	2/15	15 GGR (Land-based); 20 GGR (online)	\$5m	No wagering on MA collegiate teams unless participating in a tournament
MI	HB 4916 (2019)	Here	3/11/2020 (Land-based); 1/22/2021 (Online)	MI Gaming Control Board; Tribal Gaming Commissions	Casinos; Tribes	Land-based and online	1/15	8.4 GGR	\$100k	Leagues may request restrictions

Table: States With Legal Sports Wagering (cntd)

State	Enabling Law	Regulations	Launch Date	Regulator	Who Can Operate?	Permitted Delivery Channels	No. Online "Skins" Per Licensee/ Total	Effective Tax Rate** (%)	Upfront Operator Licensing Fee	Notable provisions
MO	Amendment 2 (2024)	Forthcoming	TBD	MO Gaming Commission	Casinos; Professional sports teams; Online operators	Land-based and online	1/21	10 GGR	\$250-500k	N/A
MS	HB 967 (2017)	Here	8/1/2018	MS Gaming Commission	Casinos	Land-based	N/A	11-12 GGR	N/A	A sports governing body may notify the commission that it desires to restrict, limit, or exclude wagering on its sporting events
MT	HB 725 (2019)	Here	3/9/2020 (Full wagering)	MT Lottery Commission	MT Lottery via bars and taverns	Land-based and on-premises mobile	N/A	N/A	N/A	N/A
NE	LB 561 (2021)	Here	6/22/2023	NE Gaming Commission	Racetracks	Land-based	N/A	20 GGR	\$1m	N/A
NV	NRS 463	Here	1949 (PASPA-exempt state)	NV Gaming Control Board and Gaming Commission	Casinos; Operators of mobile wagering systems	Land-based, mobile apps	N/A	6.75 GGR	N/A	Operators may not accept wagers on an event where the NGCB finds that a sports governing body is not ensuring the integrity of the event
NH	HB 480 (2019)	Here ; Contract	8/12/2020 (Land-based); 12/30/2019 (Online)	NH Lottery Commission	NH Lottery via private agents	Land-based and online	1/5	50-51 GGR***	Competitive bid	Must publicly disclose data sources; may participate in monitoring services and share betting data
NJ	AB 4111 (2018)	Here	6/15/2018 (Land-based) 8/1/2018 (Online)	NJ Division of Gaming Enforcement	Casinos; Racetracks	Land-based and online	3/42	9.75 GGR (Land-based) 14.25 GGR (online)	\$100k	Operators must provide details of sports bodies' policies regarding event integrity and partner with "integrity monitoring providers"

Table: States With Legal Sports Wagering (cntd)

State	Enabling Law	Regulations	Launch Date	Regulator	Who Can Operate?	Permitted Delivery Channels	No. Online "Skins" Per Licensee/ Total	Effective Tax Rate** (%)	Upfront Operator Licensing Fee	Notable provisions
NM	Indian Gaming Compact (2015); Lottery Act (1978)	N/A	10/16/2018 (Tribal); TBD (Lottery)	Tribal Gaming Commissions; NM Lottery Authority	Tribal casinos; NM Lottery	Land-based	N/A	N/A	N/A	N/A
NY	S 5883 (2013); S 2509 (2021)	Here	7/16/2019 (Land-based); TBD (online)	NY Gaming Commission	Select casinos; Online operators	Land-based and online	2/4	10 GGR (Land-based); 51 GGR (online)	\$25m (online)	A sports governing body may request the commission to exclude wagering on certain events
NC	SB 154 (2019) HB 347	Here	6/5/2018 (Land-based); 3/11/2024 (Online)	Tribal Gaming Commission; North Carolina Lottery	Tribal casinos; Online operators	Land-based and online	N/A	N/A (land-based); 18 GGR (mobile)	\$1m	A sports governing body may request the commission to exclude wagering on certain events
ND	Indian Gaming Compacts	N/A	6/23/2021	Tribal Gaming Commission	Tribal casinos	Land-based	N/A	N/A	N/A	N/A
OH	HB 29	Here	1/1/2023	Ohio Casino Control Commission	Casinos; Sport teams; Kiosk operators; Other entities	Land-based and online	2/46	20 GGR	\$1-5m (online)	A sports governing body may request the commission to exclude wagering on certain events
OR	Indian Gaming Compacts; Lottery Act (1984)	Here (Lottery)	8/27/2019 (Tribal); 10/16/2019 (Lottery)	Tribal Gaming Commissions; OR Lottery Commission	Tribal casinos; OR Lottery	Land-based (Tribes); Online (Lottery)	N/A	N/A	N/A	N/A
PA	HB 271 (2017)	Here	11/15/2018 (Land-based); 5/31/2019 (Online)	PA Gaming Control Board	Casinos	Land-based and online	1/18	36 GGR	\$10m	Operators must partner with a "third-party integrity monitor" unless able to perform function in-house
RI	HB 7200 (2018); SB 37 (2019)	Here	11/26/2018 (Land-based); 9/4/2019 (Online)	RI Lottery Commission	RI Lottery via casinos	Land-based and online	N/A	51 GGR***	N/A	N/A

Table: States With Legal Sports Wagering (cntd)

State	Enabling Law	Regulations	Launch Date	Regulator	Who Can Operate?	Permitted Delivery Channels	No. Online "Skins" Per Licensee/Total	Effective Tax Rate** (%)	Upfront Operator Licensing Fee	Notable Provisions
TN	HB 1 (2019)	Here	11/1/2020	TN Sports Wagering Council	Open licensing	Online	Unlimited	1.85 Handle	\$750k	Must share real-time betting data with leagues; no prop bets on college events
VA	HB 896 (2020)	Here	1/21/2021	VA Lottery Board	Casinos; Online operators; major league sports franchise	Land-based and online	1/19	15 GGR	\$250k	Leagues may request wagering restrictions; no wagering on VA colleges
VT	HB 127	Here	1/11/2024	Department of Liquor and Lottery	Online operators	Online	1/6	TBD	\$550k	N/A
WA	HB 2638	Here	9/9/2021	WA Gaming Commission	Tribes	Land-based	N/A	N/A	N/A	No wagering on WA colleges
WI	Indian Gaming Compacts	N/A	11/29/2021	Tribal Gaming Commissions	Tribes	Land-based	N/A	N/A	No	N/A
WV	SB 415 (2018)	Here	9/1/2018 (Land-based); 8/26/2019 (Online)	WV Lottery Commission	Casinos	Land-based and online	3/15	10 GGR	\$100k	Operators must establish integrity monitoring system and provide Lottery with remote access.
WY	HB 133 (2021)	Here	9/1/2021	WY Gaming Commission	Online operators	Online	Unlimited	10 GGR	\$100k	N/A

* Chart excludes limited sports pool operations in Montana, which were also exempt from PASPA.

** Excludes federal excise tax of 0.25 percent of betting handle, which is applied to all commercial wagering but not to state lottery operations.

*** Reflects states' share of net wagering revenue. Delaware effective tax rate excludes vendor fees of approximately 6-8 percent.

Table: States With Legal iGaming

The table below highlights key statutory and regulatory provisions applicable to online casino and poker games for each state with legal iGaming. Subscribers can find a more detailed Q&A guide to the regulatory regime of each state on the Vixio GamblingCompliance platform and use the Report Builder to compare regulatory parameters between each jurisdiction.

State	Enabling Law	Regulations	Launch Date	Regulator	Who Can Operate?	Games Permitted	Max. No. of iGaming Skins	Effective Tax Rate	Upfront Operator Licensing Fee
Connecticut	House Bill 6451	Emergency Regulations	Oct. 2021	Connecticut Department of Consumer Protection	Class III gaming tribes	Slot Games, Table Games, Poker	Two (one per tribe)	15% GGR (increases to 20% after five years)	N/A
Delaware	29 Del. C. §§ 4801-4835	10 Del. Admin. C. §206	Oct. 2013	Delaware Lottery	State lottery platform with skins limited to incumbent land-based casinos	Slot Games, Table Games, Poker	Three	20% table game proceeds; 54% video lottery proceeds	N/A
Michigan	HB 4311	Regulations	Jan. 2021	Michigan Gaming Control Board	Land-based casinos, Class III gaming tribes	Slot Games, Table Games, Poker	30 (Two per operator; one each for casino and poker)	20-28% GGR	\$100k
Nevada	NRS 463.745–463.785	Regulation 5A	April 2013	Nevada Gaming Control Board	Limited to land-based casinos	Poker	N/A	6.75% GGR	\$500k
New Jersey	N.J. Rev. Stat. §§ 5.12-95.17–5.12-95.33	N.J. Admin. Code S. 13.690	Nov. 2013	New Jersey Division of Gaming Enforcement	Land-based casinos plus skin partners	Slot Games, Table Games, Poker	Five per casino	17.5% GGR	\$400k
Pennsylvania	4 Pa.C.S. §§13B01 et seq.	Regulations	July 2019	Pennsylvania Gaming Control Board	Land-based casinos plus skin partners	Slot Games, Table Games, Poker	Unlimited	54% GGR (Slot Games); 16% GGR (Table Games/Poker)	\$10m
Rhode Island	Rhode Island General Laws, Title 42, Chapter 61.2	Rhode Island Lottery Rules and Regulations	Mar. 2024	Rhode Island Lottery Commission	State Lottery via land-based casino	Slot Games, Live Table Games	N/A	61% GGR (Slot Games); 15.5% (Table Games)	N/A
West Virginia	Interactive Wagering Act	Interactive Wagering Emergency Rules	July 2020	West Virginia Lottery Commission	Land-based casinos plus skin partners	Slot Games, Table Games, Poker	15 (three per casino)	15% GGR	\$250k

Further Resources

Regulatory & Data Tools

Vixio GamblingCompliance offers a suite of tools to help you keep up to date with U.S. Sports Betting.

Use your U.S. Sports Betting Tracker subscription to access these additional resources that are available on the Vixio GamblingCompliance website.

Market Map

Click [here](#) to view an interactive map of the U.S. sports betting market.

Q&As

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Enforcement Tracker

Access our [tracker](#), which lists enforcement actions taken against state-regulated online betting and online gaming operators in the United States.

U.S. Sports Betting Regulatory Tracker

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U.S. Sports Betting Partnership Tracker

Exclusive to Vixio GamblingCompliance subscribers, this interactive [report](#) tracks partnerships signed by companies since the U.S. Supreme Court ruling of May 2018, and surveys the market-access landscape for online sports betting and iGaming in key states.

U.S. Sports Betting & iGaming Data Dashboard

Vixio GamblingCompliance Data subscribers can access this [interactive tool](#), which allows users to build their own market-size forecasts for the rapidly expanding U.S. sports betting and online gaming sectors. The dashboard also features our own base and bull case market-size forecasts by state and channel from 2019 to 2026, illustrating where, when and how we project the total addressable market to grow.

Contact info@vixio.com to learn more.



Regulatory Intelligence

About Vixio GamblingCompliance

Vixio GamblingCompliance is the leading provider of independent legal, regulatory and business intelligence to the global gambling industry.

Trusted by leading names all over the world, our independent analysis of legal and policy developments helps power more informed understanding and effective decision making.

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About Sports Betting Outlook

This monthly report maps out how the U.S. sports betting landscape is being redrawn after the May 2018 Supreme Court ruling allowing all states to regulate wagering. It allows readers to compare state laws and key pending bills, identify policy trends and accurately forecast the size and scope of the market both in terms of anticipated legislative developments and projected revenues by participating states.

For daily analysis of regulatory and market developments, please visit the [U.S. Sports Betting](#) homepage on our website.

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