



the campaign for *fairer gambling*

UNITED STATES OF AMERICA

USA NATIONAL 2024

State Supplement #1: STATE GROUPS

Online Gambling Marketplace

MONITORING, DATA & ANALYSIS BY



The Campaign for Fairer Gambling: Introduction – 1 of 2

INTRODUCTION, 1 of 2

Financially motivated interests promote the expansion of internet gambling legalization.

Whether sports or casino, they perpetuate a false narrative of assertions that:

Illegal will be reduced by cross-over to legal
Legal is safer so it will reduce gambling harm
There are economic and fiscal benefits

The evidence to counter the legalization narrative is that:

The illegal sector is still increasing
Increasing the total market consumption increases the total harm
Cross-over from other disposable spend activity hurts the wider economy

Fiscal consequences are complex:

Tax level to compensate for the cost of social harms	15%
Tax level to compensate for the economic detriments	15%
Minimum tax level to achieve positive fiscal impact	30%

Compiled by Derek Webb, founder and funder of the Campaign for Fairer Gambling.

**Protecting Online Borders. Defending the Economy.
Minimizing the Harm.**

Brandt Iden representing the Sports Betting Alliance* supporting Indiana House Bill 1432 to legalize internet casino gambling on 1/28/25 stated to elected representatives:

"These illegal casinos have no oversight, no consumer protection and zero revenue for the state." **TRUE.**

"Today you have the opportunity to correct that." **FALSE.**

*Sports Betting Alliance includes FanDuel, owned by Flutter, and Entain, a partner of MGM. Each of Flutter and Entain entities have obtained profits from jurisdictions without approval from those jurisdictions.

The Campaign for Fairer Gambling: Introduction – 2 of 2

INTRODUCTION, 2 of 2

Proponents for the legalization of all forms of online gambling - sports betting, casino and more - continue to assert that legalization alone will convert the marketplace in favor of legal, licensed brands. America has been possessed by illegal gambling for more than three decades and it is clear from the data in this report and the [CFG 2024 USA National report](#) that crime and illegal gambling have not been reduced or removed by legalization.

The illegal sector is not going away without dedicated and targeted action, including potential federal intervention.

This report takes US Census Bureau data for the population of each state and the whole of the US. It separates states into three relevant groups:

- **No legal online sports betting and casino.**
- **Legal online sports betting only.**
- **Legal online sports betting and casino.**

This report then creates the basis for an amount lost per capita for each group. It takes the US Census Bureau data for income per capita which enables creation of the amount lost as a percentage of income. This technique gives a comparative between each of the three groups and the whole of the US. It presents this for the legal and illegal sectors.

It should be noted that the US Census Bureau data basis includes all ages and non-gamblers, so is not indicative of the actual amount lost per gambler, in either dollar or percentage terms. However, by taking the income variable into account, it offers the best illustration of the impact on income for each group relative to the country as a whole.

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Yield Sec: State Supplement #1 – Executive Summary

When audiences want to find sports betting and gaming online – content that they demand and wish to engage with – they should find fair, sustainable and safe online betting and gaming in every marketplace across America.

Today, not every betting app or website is legal. This impacts local commerce and community in every jurisdiction: in-state jobs, supply chain, oversight and control, and the fundamental societal quid pro quo: the receipt of regulated revenue and taxation. This financial commitment to provide for in-state commerce, community and consumer safety is what society requires for activities like gambling to be present and sustainable. Its removal by illegal operators is not a “grey market”, a “black market”, “loss” or “leakage”.

It is theft.

This theft means one thing for America today: The market promise has not materialized for legal, licensed online betting and gaming brands in America.

The American Gambling Gold Rush promised by state-based legalization has instead turned into the Great Illegal Gambling Robbery, as illegal brands exploit price, product and promotion at every opportunity to offer consumers what they demand: the one-stop gambling shop, online.

America has been suffering theft from its online gambling marketplace for three decades. The last seven years – during which state-based legalization has been possible – has seen 31 states legalize and regulate online sports betting alone, and 7 legalize and regulate online casino in addition.

This patchwork quilt of legality across the existence of online gambling and the legal product offering – which products are legally available – is today being leveraged by two groups:

- a) Legal Challengers & Innovators: Predictors, sweepstakes and social casino seek to introduce the online gambling which consumers know and love via the “back-door”, whilst creating challenges for legal sports betting and casino. These legal innovators also have their own challenges – from crime and illegals replicating their products.
- b) Illegal Operators: Long-term legacy illegals and new entrant illegals see the imperfect legal distribution of online gambling products across America as one thing – an opportunity to make a huge amount of money by stealing from American commerce, community and consumers.

Yield Sec 2024 data and analysis across America shows a massive increase in revenue for illegal gambling: stemming from the rise of illegal predictors as a product, and the COPA America and Olympics events being used, on top of the Super Bowl and March Madness, as further mass market recruitment opportunities. How do these affect revenue? Crime cross-sells from sports and predictors into other products, like casino, seamlessly, to simply keep more of every dollar deposited by American consumers. Now, with nearly three-quarters of the total online marketplace for online sports betting and casino being dominated by crime, 2025 stands as a “tipping point year”: actions must be taken now to **stop the steal across American online gambling** for the benefit of American commerce, community and consumers. These actions are not limited to the gambling sector alone – there is a loud and clear echo across American sports and streaming businesses, who are also being stolen from due to their nexus with gambling.

Who should take action against illegal gambling? Illegal gambling is not “someone else’s problem”. It is every legal stakeholder’s problem. It is your money, after all, that is being stolen...

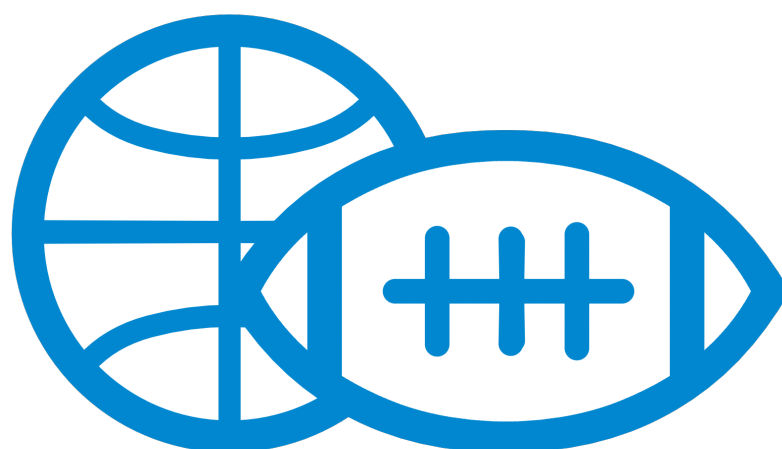
The Three Stages of American Online Gambling Reality

Understanding online gambling in America through three groups:

**NO LEGAL
ONLINE SPORTS
BETTING AND
CASINO**



**LEGAL ONLINE
SPORTS
BETTING ONLY**



**LEGAL ONLINE
SPORTS
BETTING AND
CASINO**



Through the "Prism": Online Sports Betting and Casino



What type of state is yours?

Yield Sec: Online Gambling Legality – USA – Operational Status as of 2025 Q1

**NO LEGAL ONLINE
SPORTS BETTING
AND CASINO**

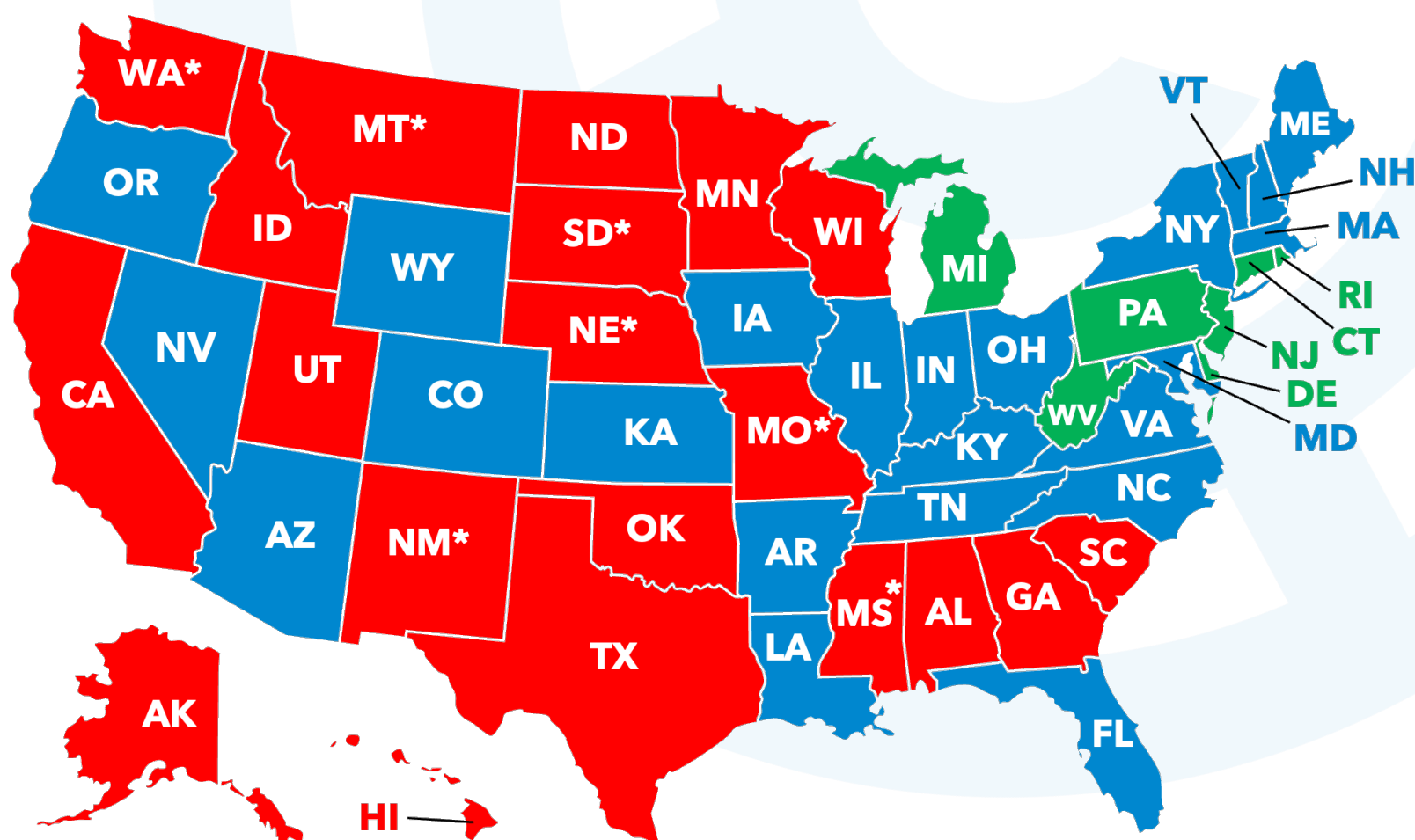
20

**LEGAL ONLINE
SPORTS
BETTING ONLY**

23

**LEGAL ONLINE
SPORTS
BETTING AND
CASINO**

7



US Census: Income and Population



AVERAGE USA TOTAL

AVERAGE FOR STATES WITH NO LEGAL ONLINE SPORTS BETTING AND CASINO

AVERAGE FOR STATES WITH LEGAL ONLINE SPORTS BETTING ONLY

AVERAGE FOR STATES WITH LEGAL ONLINE SPORTS BETTING AND CASINO

**PER CAPITA
INCOME:
2019-2023
(2023 DOLLARS)**

\$43,289

\$40,637

\$43,981

\$44,152

**AVERAGE
POPULATION
IN GROUPED
STATES**


6,574,500

6,924,905

6,541,522


5,686,412

USA \$GGR per Capita 2024: Averages

	USA TOTAL	AVERAGE FOR STATES WITH NO LEGAL ONLINE SPORTS BETTING AND CASINO	AVERAGE FOR STATES WITH LEGAL ONLINE SPORTS BETTING ONLY	AVERAGE FOR STATES WITH LEGAL ONLINE SPORTS BETTING AND CASINO
TOTAL ONLINE \$GGR PER CAPITA 2024	\$268.98	\$124.48	\$336.49	\$495.89
TOTAL LEGAL ONLINE \$GGR PER CAPITA 2024	\$68.75	N/A	\$74.88	\$282.92
TOTAL ILLEGAL ONLINE \$GGR PER CAPITA 2024	\$200.23	\$124.48	\$261.51	\$212.97

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Legalization: Effects Upon Online \$GGR Per Capita and Income



	USA TOTAL	AVERAGE FOR STATES WITH NO LEGAL ONLINE SPORTS BETTING AND CASINO	AVERAGE FOR STATES WITH LEGAL ONLINE SPORTS BETTING ONLY	AVERAGE FOR STATES WITH LEGAL ONLINE SPORTS BETTING AND CASINO
TOTAL ONLINE \$GGR PER CAPITA AS A % OF INCOME	0.62%	0.31%	0.77%	1.12%
TOTAL LEGAL ONLINE \$GGR PER CAPITA AS A % OF INCOME	0.16%	0.00%	0.17%	0.64%
TOTAL ILLEGAL ONLINE \$GGR PER CAPITA AS A % OF INCOME	0.46%	0.31%	0.59%	0.48%

Growth by Group: From Illegal to Legal Online Sports Betting Only

TOTAL ONLINE GGR PER CAPITA AS A % OF INCOME

**AVERAGE FOR STATES
WITH NO LEGAL
ONLINE SPORTS
BETTING AND CASINO**

0.31%

**AVERAGE FOR
STATES WITH LEGAL
ONLINE SPORTS
BETTING ONLY**

0.77%

+148%

Growth in total online
GGR per capita as a
percentage of income.

Growth by Group: From Illegal to Legal Online Sports Betting and Casino

TOTAL ONLINE GGR PER CAPITA AS A % OF INCOME

**AVERAGE FOR STATES
WITH NO LEGAL
ONLINE SPORTS
BETTING AND CASINO**

0.31%

**AVERAGE FOR STATES
WITH LEGAL ONLINE
SPORTS BETTING AND
CASINO**

1.12%

+261%

Growth in total online
GGR per capita as a
percentage of income.

The Campaign for Fairer Gambling: Conclusion

CONCLUSION

Illegal online gambling is still dominant over legal and still growing even faster. State legalization without a gameplan to counter illegal online gambling has been an unmitigated disaster. Our [CFG 2024 USA National report](#) showed an American online gambling marketplace worth \$90.1 billion total - \$67.1 billion of which is illegal and \$23.0 billion which is legal.

The United States Census Bureau trade deficit by country identifies only three countries with US trade deficits over \$90 billion: China, Mexico and Vietnam. Only three more countries are identified with trade deficits over \$67 billion: Ireland, Germany and Taiwan.

Efficient government is best achieved by cross-departmental policies and cross-agency understanding, generating aligned all-of-government best direction. The Commodities Futures Trading Commission (CFTC) postponed a planned roundtable on the subject of sports prediction markets and legal industry leader, Kalshi. State opposition to Kalshi has generated legal actions, which may proceed to the Supreme Court prior to formal resolution. CFG support for sports predictions was qualified by requesting federal action against illegal prediction products and illegal sports betting and casino operations.

Meanwhile, states have failed to act meaningfully against conventional illegal online gambling operators that have been generating far more revenues than Kalshi for far, far longer. It is imperative that there is recognition of the urgent need to eradicate the illegal online betting and gaming sectors.

In Ohio proponents of iGaming legalization quote the CFG data on the Ohio market and assert that is a reason to legalize. The Ohio loss per capita as a percentage of income is already at 1.33%, higher than the average for all states that have already legalized iGaming at 1.12%. Legal expansion in Ohio will only increase that negative impact. There should be a moratorium on state expansion until effective action reduces illegal revenues.

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Yield Sec: Notes on this Report

Yield Sec, short for *yield security*, is a technical intelligence platform monitoring all audience activity across gambling, streaming, crypto and consumer goods to see the total online marketplace – both legal and illegal. Yield Sec delivers analysis, actions and recommendations to ensure online stakeholders make the money they should – and are not stolen from by crime.

The following key notes apply across Yield Sec data in this report:

ONLINE ONLY

Yield Sec covers the total online marketplace, including both legal and illegal online gambling. No retail or land-based data is included in our reporting.

SIMPLE FINANCIAL DEFINITIONS

“Handle” – relates to the value of bets placed by consumers with online gambling operators. “Hold” – relates to the value left behind with online gambling operators, after customer winnings have been repaid. “GGR” – relates to Gross Gaming Revenue, or Customer Bets MINUS Customer Winnings EQUALS Gross Gaming Revenue.

PRODUCTS COVERED BY THE DATA IN THIS REPORT: SPORTS BETTING (INCLUDING PREDICTORS) AND CASINO (INCLUDING POKER)

Throughout this report, online sports betting includes both traditional online sports betting and predictors. Within legal online sports betting, all legal predictors are included. Within illegal online sports betting, all illegal predictors are included.

TARGETING, ACCESSIBLE AND TRANSACTING (TAT)

Only operators who actively target the jurisdictional marketplace through audience profiling, advertising and affiliate deals, who are accessible to the local audience, and who feature verified local resident payment abilities for transacting are classed and included as “illegal” or “unsanctioned” operators if they do not have local legal licensing for the jurisdiction they are taking revenue from.

MIRRORS AND REDIRECTS

Websites and apps used to reach audiences and avoid destination blacklists and blocklists – effectively, “back doors” into illegal operator destinations that the audience will have no knowledge concerning.

AVAILABLE BUT NOT TARGETING OR TRANSACTING

Operators who have an accessible website/app but without any active commercial ability to transact (place bets, spin slots and produce revenue) are not classed or included as “illegal” or “unsanctioned” operators. They’re effectively available by virtue of robust SEO, but do not feature commercial viability within the marketplace.

AVERAGES

Yield Sec averages are calculated on the basis of total population (US Census Bureau data) and total online marketplace GGR.

ACCURACY

Our analysis derives from data obtained from our online surveillance as well as from third party licensors. Our assessment of large complex online marketplaces is limited by the availability and completeness of data. We are confident that our platform provides by far the best analysis of online marketplaces possible.

Yield Sec: Glossary

What is Illegal Gambling? Anything that is not legal and licensed, but which targets, is accessible, and is transacting in a jurisdiction, with consumers in that jurisdiction.

Audience: All potential, unique human beings in a specific jurisdiction using online services (including children).

Activity: All states of online behavior, everything from browsing (looking) through to buying (transacting).

Total Online Gambling Marketplace: There is only one marketplace in a jurisdiction. Unfortunately, it features two sectors: one legal, one illegal. To get to total, you must consider and add legal plus illegal.

Black Market: The common name for illegal operators. Why don't we use it? It's misleading - there is no separate marketplace - and "black market" is the name crime gave itself to make it appear somehow distinct. It is not distinct: it is simply stealing money.

Illegal: Meaning you are not licensed in the jurisdiction you are targeting, accessible in, and transacting with.

Interaction/Interacting: Consumer engagement with an illegal operator. The consumer is doing more than simply "seeing" content: a consumer has *engaged* with it by clicking on ads, registering with websites, liking social posts, etcetera, anything that has amended their current and future experience online - due to the algorithms and cookies - in favor of greater future exposure with illegal operators.

Affiliates: For-profit groups across websites, apps and social media which engage audiences with content including reviews, comparisons, special offers, promotions, discounts, and news, to move that audience on to commercial opportunities with gambling operators in return for a fee or a share of customer transactions, and often both.

Audience Exposure: The impact of gambling and related content upon the audience across a blended view of the Eight Ecosystem Essentials (search, P2P comms, sites, ads, streaming, affiliates, social, apps). The audience exposure measure is a useful "early warning indicator" of where GGR market share split could flow in the future.

Traffic Channelization: All visits across the entire marketplace broken out by share of operator and legal or illegal.

Unique Audience Share: Unique audience member visits on an operator-specific basis, broken out by share.

Traffic Volume: The volume of visits made by the online audience to online opportunities.

Uniques Volume: The volume of unique human beings using specific online services.

Contacts & Questions



Website
FairerGambling.com

General Contact
info@fairergambling.com

Press
info@fairergambling.com

For US Legislators
brianne@consultbds.com

Fairer Gambling is funded by Derek Webb LLC (CA 202356017711)

Derek Webb LLC
Suite 800, 8383 Wilshire Blvd, Beverly Hills, CA, 90211, USA



Website
YieldSec.com

General Contact
info@yieldsec.com

Press
info@yieldsec.com

Head of Press
Yasmine Scott
yasmine.scott@yieldsec.com

Yield Sec is a technical marketplace intelligence platform from Yield Sec Global Inc.

Address: 2400 Herodian Way SE,
#220 - Smyrna, GA 30080 - USA

FOR MORE INFORMATION:

[CFG USA National 2024: Press Page](#)

[CFG USA National 2024: Report](#)

[CFG USA National 2024: State Specific Report - Ohio](#)