



the campaign for *fairer gambling*

PREPARED JULY 2025
UNITED STATES OF AMERICA

USA NATIONAL 2024
State Supplement #2: ALL STATES

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

The [CFG USA National 2024](#) report showed that the illegal online gambling sector is larger than the legal sector and is growing faster.

[2024 CFG USA State Supplement #1: State Groups](#) took 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 created the basis for an amount lost per capita for each group. It then took 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 presented this for the legal and illegal online gambling sectors.

This new 2024 CFG USA State Supplement #2: All States report takes the same percentage on income per capita for each state and creates a comparative analysis by total marketplace, legal sector and illegal sector as on page 9. This provides an opportunity to identify outlying states to enable consideration of differentials.

It also identifies the number of legal online operators per state. This then provides an illustration of income per capita and number of legal online operators as on page 11. Number of legal online operators is just one differential that could influence the total market size of a state and the impact on the illegal online gambling sector.

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 state relative to other states and the country as a whole.

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**Protecting Online Borders. Defending the Economy.
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Yield Sec: State Supplement #2 – 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 30 states (plus Washington D.C.) legalize and regulate online sports betting, and 7 legalize and regulate online casino.

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:

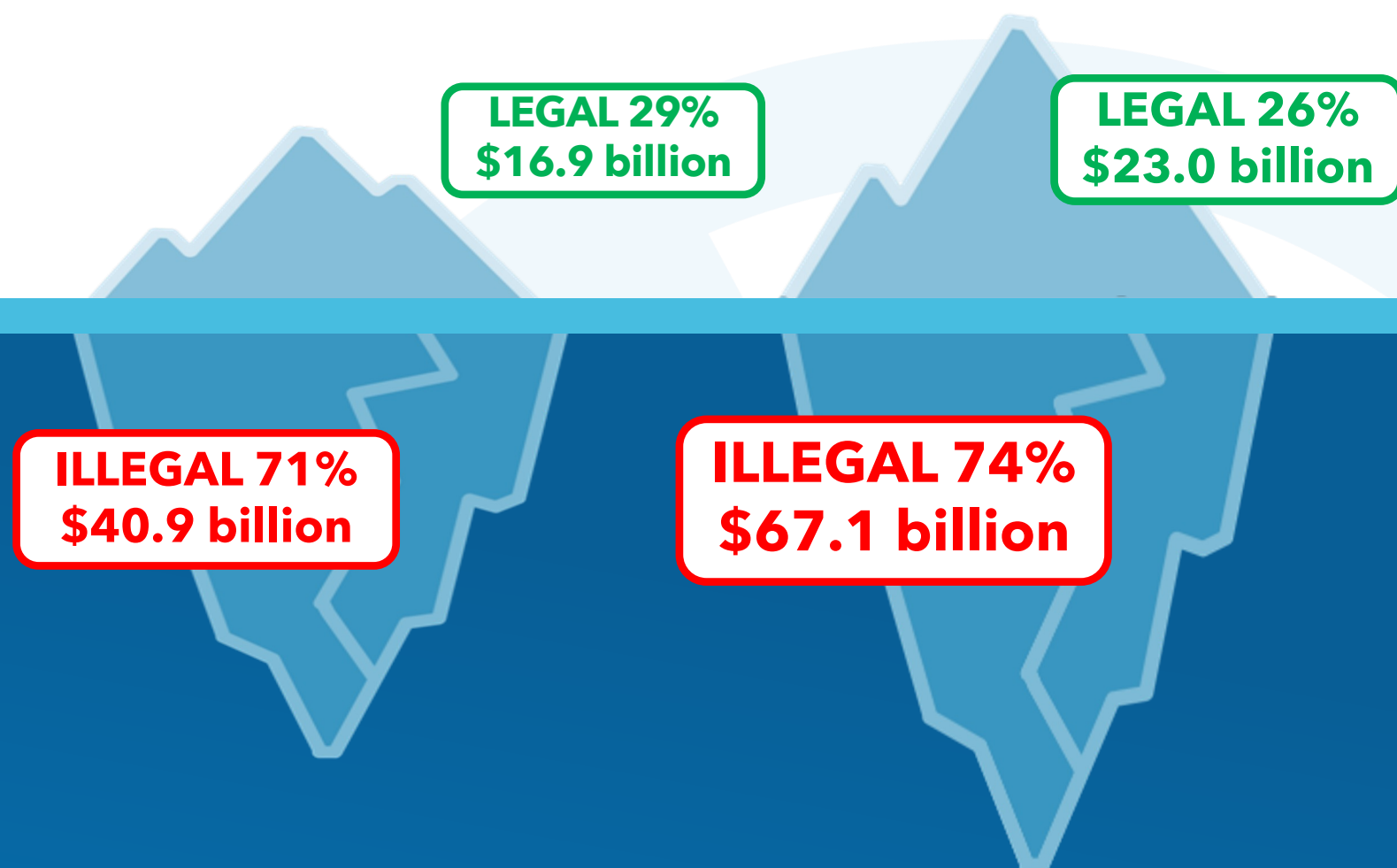
- a) Legal Challengers & Innovators: Predictors, sweepstakes and social casino seek to introduce the online gambling which consumers know and love via the “back-door”, whilst creating challenges for legal sports betting and casino. These legal innovators also have their own challenges – from crime and 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.

Please note: In this report, online sweepstakes and social casinos are not included in any data set. Only online sports betting, online casino and online poker are. Within online sports betting, legal and illegal predictors on sports events are included.

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...

In the Iceberg Marketplace, Crime Grows



**GROSS GAMBLING
REVENUE 2023
TOTAL:
\$57.8 billion**

**GROSS GAMBLING
REVENUE 2024
TOTAL:
\$90.1 billion**

**TOTAL:
56% GROWTH**

**LEGAL:
36% GROWTH**

**ILLEGAL:
64% GROWTH**

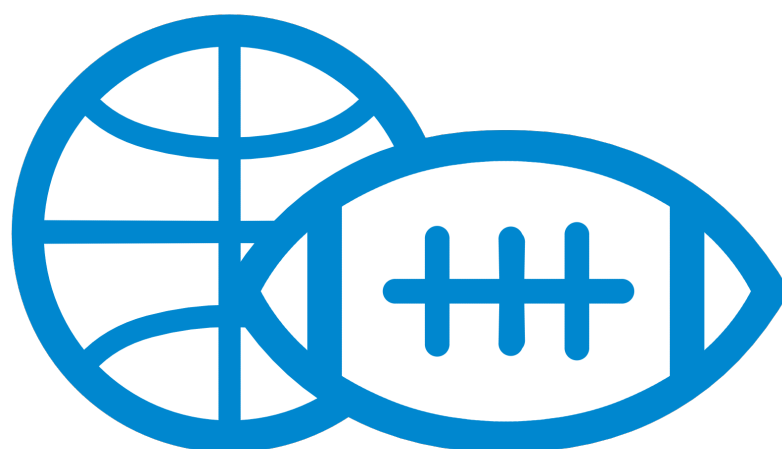
The Three Stages of American Online Gambling Reality

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**



Top 10 US States by GGR

State	Legal Sector	Illegal Sector
New York 2024	\$2,099,143,426	\$5,297,922,595
Pennsylvania 2024	\$3,584,903,704	\$2,698,085,621
Ohio 2024	\$899,684,607	\$5,263,043,394
New Jersey 2024	\$3,551,612,512	\$2,522,115,907
California 2024	No Legal Online Gambling	\$5,488,135,924
Illinois 2024	\$1,243,383,784	\$3,954,741,104
Michigan 2024	\$2,911,468,491	\$2,180,156,407
Texas 2024	No Legal Online Gambling	\$4,503,405,254
Florida 2024	\$881,569,438	\$3,103,496,522
Virginia 2024	\$668,906,515	\$2,420,592,314

KEY:

LEGAL ONLINE SPORTS
BETTING ONLY

LEGAL ONLINE SPORTS
BETTING AND CASINO

NO LEGAL ONLINE SPORTS
BETTING AND CASINO

State	Total Marketplace	Legal %	Illegal %
New York 2024	\$7,397,066,021	28%	72%
Pennsylvania 2024	\$6,282,989,325	57%	43%
Ohio 2024	\$6,162,728,001	15%	85%
New Jersey 2024	\$6,073,728,419	58%	42%
California 2024	\$5,488,135,924	0%	100%
Illinois 2024	\$5,198,124,888	24%	76%
Michigan 2024	\$5,091,624,898	57%	43%
Texas 2024	\$4,503,405,254	0%	100%
Florida 2024	\$3,985,065,960	22%	78%
Virginia 2024	\$3,089,498,829	22%	78%



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**ALL US STATES:
PER CAPITA -
ONLINE
GAMBLING
GGR AS A
PERCENTAGE
OF INCOME**

USA 2024: State Tracker – Total Online GGR Per Capita as a % of Income

LA 1.33%	OH 1.33%	MI 1.28%	NJ 1.23%	KY 1.23%
PA 1.12%	WV 1.11%	IA 1.06%	IN 1.05%	TN 1.04%
NV 0.98%	KS 0.94%	IL 0.92%	VA 0.82%	NY 0.76%
CO 0.75%	AZ 0.72%	NC 0.70%	WY 0.68%	CT 0.65%
MA 0.64%	MD 0.62%	NH 0.54%	VT 0.45%	FL 0.43%
RI 0.40%	TX 0.37%	DE 0.37%	MS 0.34%	UT 0.34%
GA 0.33%	AL 0.32%	OK 0.31%	NM 0.30%	CA 0.29%
AR 0.29%	ID 0.28%	SC 0.27%	MO 0.27%	SD 0.27%
MT 0.26%	NE 0.25%	WI 0.25%	ME 0.24%	ND 0.24%
AK 0.24%	OR 0.23%	HI 0.23%	MN 0.22%	WA 0.20%

US TOTAL AVERAGE
0.62%

AVERAGE
1.12%

AVERAGE
0.77%

AVERAGE
0.31%

KEY:

LEGAL ONLINE SPORTS
BETTING ONLY

LEGAL ONLINE SPORTS
BETTING AND CASINO

NO LEGAL ONLINE SPORTS
BETTING AND CASINO

USA 2024: State Tracker – Number of Operators

LEGAL OPERATORS AVAILABLE IN EACH STATE

38 NJ	24 PA	21 CO	20 OH	19 IA	19 MI
17 VA	16 AZ	14 NV	13 MD	12 IN	12 TN
10 IL	10 NY	10 WV	9 LA	8 KY	8 NC
7 KS	7 MA	5 WY	4 DE	3 AR	3 VT
3 CT	2 ME	2 RI	1 FL	1 NH	1 OR

ILLEGAL OPERATORS TARGETING THE USA VIA ALL STATES

917

AVERAGE LEGAL OPERATORS

14

9

KEY:

LEGAL ONLINE SPORTS
BETTING ONLY

LEGAL ONLINE SPORTS
BETTING AND CASINO

NO LEGAL ONLINE SPORTS
BETTING AND CASINO

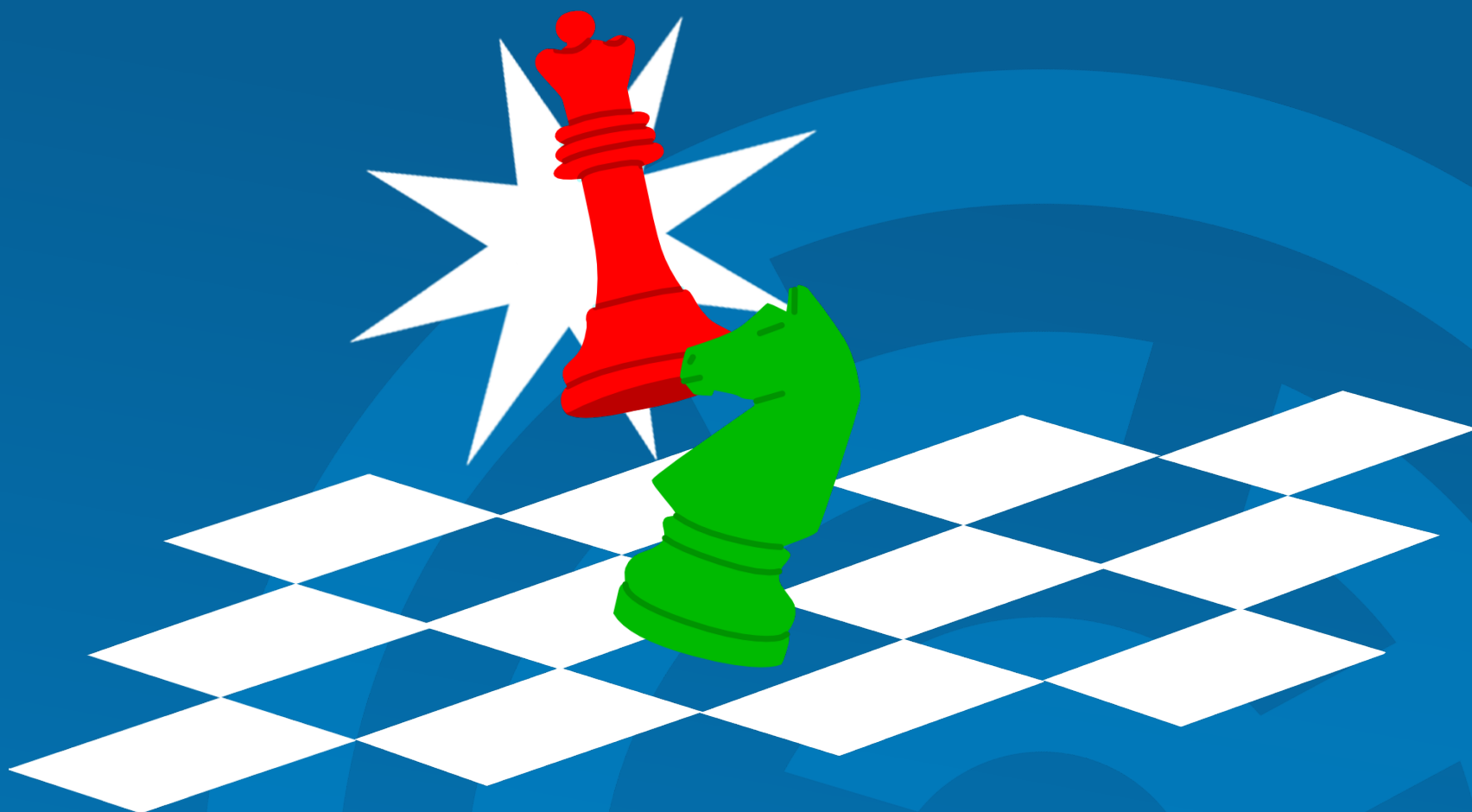
USA 2024: State Tracker – Combined

LEGAL OPERATORS AVAILABLE IN EACH STATE / TOTAL ONLINE GGR PER CAPITA AS A % OF INCOME					
9 LA 1.33%	20 OH 1.33%	19 MI 1.28%	38 NJ 1.23%	8 KY 1.23%	24 PA 1.12%
10 WV 1.11%	19 IA 1.06%	12 IN 1.05%	12 TN 1.04%	14 NV 0.98%	7 KS 0.94%
10 IL 0.92%	17 VA 0.82%	10 NY 0.76%	21 CO 0.75%	16 AZ 0.72%	8 NC 0.70%
5 WY 0.68%	3 CT 0.65%	7 MA 0.64%	13 MD 0.62%	1 NH 0.54%	3 VT 0.45%
1 FL 0.43	2 RI 0.40%	4 DE 0.37%	3 AR 0.29%	2 ME 0.24%	1 OR 0.23%

US TOTAL AVERAGE 0.62%	AVERAGE 1.12%	AVERAGE 0.77%	AVERAGE 0.31%
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KEY:	LEGAL ONLINE SPORTS BETTING ONLY	LEGAL ONLINE SPORTS BETTING AND CASINO	NO LEGAL ONLINE SPORTS BETTING AND CASINO
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Legalization and Regulation: The “Zero-Sum Game” Myth



Decades of illegal online gambling in the USA were meant to end with legalization and regulation. The hope was simple: legal, licensed options in each state would "channelize" the marketplace and eliminate illegal gambling.

That hasn't happened.

Why?

Because legalization alone isn't a zero-sum game – where the existence of laws automatically means crime loses.

Illegal gambling isn't one problem. It's many. And those problems affect every legal stakeholder: state governments, licensed operators, affiliates, media platforms, payment providers, sports leagues and teams, sports broadcasters and streamers, law enforcement, and more.

Online marketplaces must identify, reduce, and remove crime – constantly. That only happens through process:

MPEO – Monitor. Police. Enforce. Optimize.

Every stakeholder has a role in kicking crime out of America's online gambling marketplaces. Because it's your money being stolen. Your audiences being abused. Your marketplaces being made unsafe and unfair by crime.

The Campaign for Fairer Gambling: Conclusion

CONCLUSION

This report, along with the others in the CFG USA 2024 Series covering [CFG USA National 2024](#), [2024 CFG USA State Supplement #1: State Groups](#) and [CFG USA Illegal Streaming of Sports Events and Illegal Gambling 2024](#), is the culmination of years of monitoring, and months of analysis and work upon the online sports betting, casino and poker marketplaces across the United States. It represents the most comprehensive, audience-focused and data-intense study to date upon the reality of American online gambling, and how it has been hijacked by crime. The Campaign for Fairer Gambling is pleased that this work has been embraced and adopted by myriad stakeholders including politicians, state governments, operators, affiliates, media outlets, sports leagues and teams, tech platforms and many more.

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

There are three states with legalized online sports betting where the market is below the average of 0.31% GGR per capita as a percentage of income for states with no legalization, being Oregon, Maine and Arkansas. These states have legal operator numbers of Oregon 1, Maine 2 and Arkansas 3, for an average of 2, below the national average of 9.

There are three states with both legalized online sports betting and casino gaming where the market is below the average of 0.77% of GGR per capita as a percentage of income for states with legalization of online sports betting only, being Delaware, Rhode Island and Connecticut. These states have legal operator numbers of Delaware 4, Rhode Island 2 and Connecticut 3 for an average of 3, below the national average of 14.

There is a pronounced correlation between having a small number of legal operators and lower GGR per capita as a percentage of income.

The proponents of legalization assert that having more legal operators is better for competition and implies that this will help reduce the size of the illegal sector. The evidence contradicts this assertion.

The onus is on the proponents of legalization to provide an explanation as to how they managed to get it so wrong – at the least, they should apologize to the legislators they influenced based on their misleading representations. There should now be a moratorium on state expansion until effective action reduces illegal revenues and enables effective control of online gambling marketplaces.

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

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



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NOTES

State Acronyms

AL	Alabama
AK	Alaska
AZ	Arizona
AR	Arkansas
CA	California
CO	Colorado
CT	Connecticut
DE	Delaware
FL	Florida
GA	Georgia
HI	Hawaii
ID	Idaho
IL	Illinois
IN	Indiana
IA	Iowa
KS	Kansas
KY	Kentucky
LA	Louisiana
ME	Maine
MD	Maryland
MA	Massachusetts
MI	Michigan
MN	Minnesota
MS	Mississippi
MO	Missouri

MT	Montana
NE	Nebraska
NV	Nevada
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NY	New York
NC	North Carolina
ND	North Dakota
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VT	Vermont
VA	Virginia
WA	Washington
WV	West Virginia
WI	Wisconsin
WY	Wyoming

KEY:

**LEGAL ONLINE SPORTS
BETTING ONLY**

**LEGAL ONLINE SPORTS
BETTING AND CASINO**

**NO LEGAL ONLINE SPORTS
BETTING AND CASINO**

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. Products not covered by the data in this report: daily fantasy sports, sweepstakes, social casinos, prize draw contests, lotteries.

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.

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.

Contacts & Questions



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CFG USA 2024 REPORTS

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

[CFG USA National 2024: Report](#)

[CFG USA Illegal Streaming of Sports Events and Illegal Gambling 2024](#)

[2024 CFG USA State Supplement #1: State Groups](#)