Casino and Casino-style Gambling - US - December 2012

Scope and Themes

"While the casino industry as a whole has recovered from the revenue declines it suffered throughout the recession years, gaming destinations continue to face competition for visitors from other leisure venues, from intra-industry competition (ie, other areas' casinos)—and from the dining and entertainment located in casinos that are designed to bring customers on premise. In some cases, the draw of the restaurants, bars, and live entertainment overshadows that of the games. As a result, many casinos are looking for ways to bring customers back to the floor (or at least to gaming).

– Fiona O'Donnell, Senior Lifestyles & Leisure Analyst

In this report we answer the key questions:

- **Is the market saturated, or is there room for growth?**
- **Does the notion of a casino visit as "big night out" help or hurt revenue?**
- **Will online gaming be a boost or bust to brick-and-mortar casinos?**
- **How can casinos bring gaming back to the forefront?**

The casino industry contracted by nearly $3 billion in revenues during the recession when consumers cut discretionary spending in the face of economic uncertainty, and while the industry has recovered and expects to exceed pre-recession sales to reach $66.1 billion in 2012, the industry is highly competitive and in some markets (particularly the Eastern Seaboard), market saturation looms.

Despite an increase in gaming establishments in the area, even more are expected to be added—both from commercial operators as well as from tribal casinos. Meanwhile, the share of the U.S. population who say they have visited a casino in the last year has yet to increase,

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

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which means that for casinos to stay in the game they will need to create a product that can convince a greater share of the public that these establishments are worthy of their leisure time and dollars.

This report builds on the analysis presented in Mintel's *Casino and Casino-style Gambling—U.S., January 2011,* as well as the January 2010, November 2008, and November 2006 reports of the same title. For the purposes of this report, the following definitions have been used:

The "casino industry" includes commercial casinos, tribal casinos, and racetrack casinos (sometimes referred to as "racinos"). This includes table games like poker, as well as electronic gaming devices (EGDs); Class II games such as bingo; and Class III games such as slot machines, blackjack, craps, and roulette. Card rooms are excluded from this report.

This report focuses on brick-and-mortar casinos and the companies that operate them. Although online gambling is discussed, this report does not provide extensive analysis of the online gambling industry. At the time of this writing, most forms of online gambling are illegal for operation in the U.S.

Sales Data

- *Market Size and Forecast*, *Segment Performance* sections: based on data from the American Gaming Association (AGA), State Gaming Regulatory Agencies, and the National Indian Gaming Commission. Note that these numbers will differ from previous Mintel reports because "commercial" casino revenues have modified to include racetrack casino revenues—which the industry considers part of the commercial casino segment (previous Mintel reports showed commercial and racino segments separately).

- *Leading Commercial Casinos*: based on company Securities and Exchange Commission (SEC) 10-K filings.

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