2023 American Attitudes Towards Gaming



::: Survey Methodology

AUDIENCE

Key audience and subgroup analysis among:

- Americans (n=2,002): Nationally representative sample of voters aged 21+*
- Past-year casino visitors (n=830): Visited a casino in the last 12 months to gamble or for some other reason
- Past-year gamblers (n=981): Participated in any form of gambling at all during the past 12 months, whether at a casino or racetrack, at a sportsbook, a lottery location, at a bar, tavern or truck stop, or over the Internet
 - Physical casino players (n=531): Participated in physical casino gaming in the last 12 months
 - Sports bettors (n=409): Participated in sports betting online, at a physical sportsbook, or with a bookie in the last 12 months
 - iGamers (n=284): Participated in real-money casino gaming over the Internet in the last 12 months

Mode Online survey

Dates in Field

August 11-18, 2023

Margin of Error

+/- 2% at 95% confidence level. Higher for subgroups

*Note that survey waves prior to 2021 were conducted among smaller samples of 1,000 adults age 21+ (not necessarily registered voters).

::: Survey Highlights

9-in-10

Americans say casino gambling is acceptable for themselves or others.

71%

say that casino gaming contributes positively to the U.S. economy.



or more also recognize gaming's positive impact on local economies, job creation and tourism.

102 million

U.S. adults visited a casino in the past 12 months.

42 years

Average age of casino visitors in the past year, down for a fourth consecutive year from 49.6 in 2019.

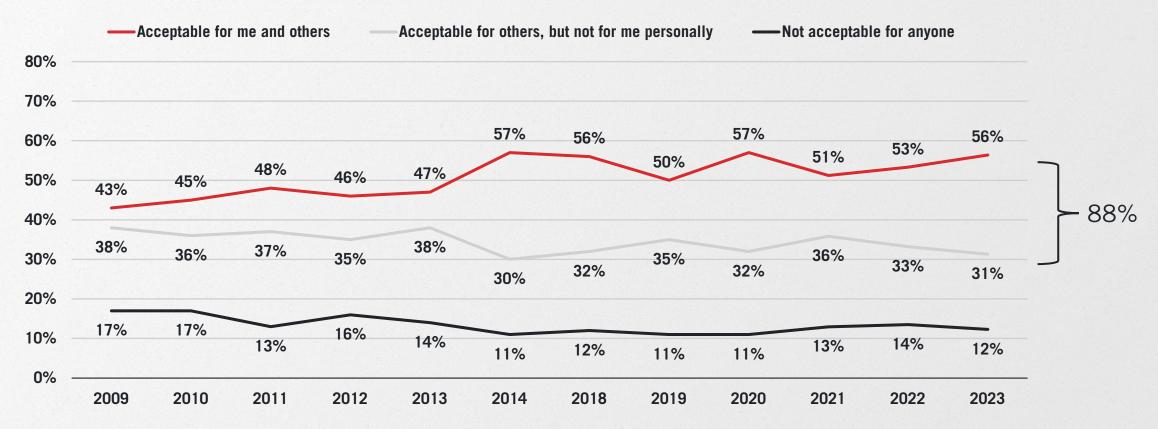
49%

Share of adult Americans that participated in some form of gambling in the past year.



: : : A High Level of Gambling Acceptance Has Remained Consistent For Over a Decade

PERSONAL VIEW OF CASINO GAMBLING

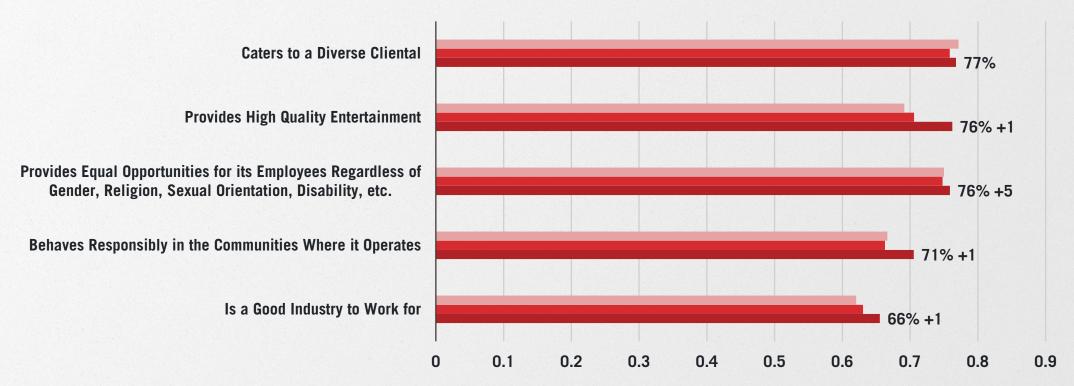




Base: Among Americans (n=2,002) Q22. What are your own personal views of gambling? Would you say casino gambling is...? The "Don't know" response option was removed after the 2019 survey.

::: Public Acknowledges Gaming's Diversity, Opportunities and Responsibility

FOR EACH WORD OR PHRASE, INDICATE HOW WELL YOU THINK IT DESCRIBES THE CASINO GAMING INDUSTRY DESCRIBES VERY/PRETTY WELL



2021 2022 2023

AMERICAN GAMING ASSOCIATION* Base: Among Americans (n=2,002) Q31. For each word or phrase, indic

Q31. For each word or phrase, indicate how well you think it describes the casino gaming industry.

Q36. Recently, many companies have placed a greater importance on their social and environmental impacts. Below is a list of words and phrases which people use to describe these efforts. For each word or phrase, indicate how well you think it describes the casino gaming industry.

::: There's Widespread Recognition of Gaming as a Growing, Value-Adding Segment of the U.S. Economy

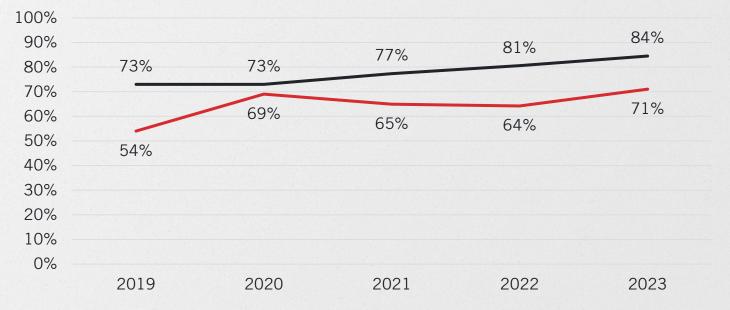


Acknowledgement of gaming's contribution to the U.S. economy reaches new high.

GAMING'S ECONOMIC IMPACT Agreement with statements

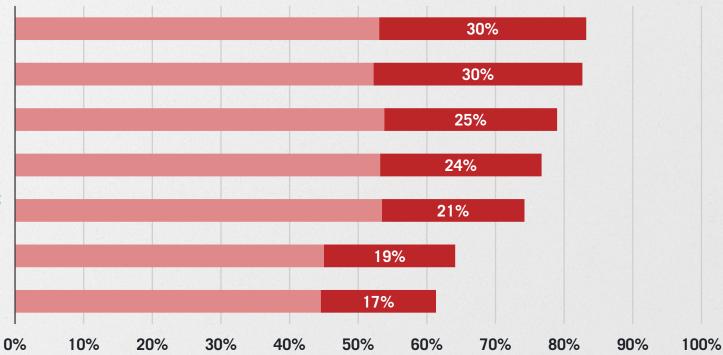
-----The casino gaming industry has a positive impact on the U.S. economy

-The casino gaming industry is a growing industry



: : : Strong Majorities Recognize Gaming's Positive Impact on Local Economies, Job Creation and Tourism

FOR EACH WORD OR PHRASE, INDICATE HOW WELL YOU THINK IT DESCRIBES THE CASINO GAMING INDUSTRY



Pretty Well Very Well

Brings Entertainment and Dining Options to Areas or Regions that Might not Otherwise be Able to Attract Them

> Increases Tourism and Brings Conventions and Meetings to Areas Where it is Located

Produces Jobs and Investments Here in the U.S. That Cannot be Outsourced to Other Countries

Creates Good Paying Jobs

Offers Employees Opportunities to Start at the Ground Floor and Work Their Way Up

Contributes to the Revitalization and Growth of Underdeveloped or Economically Struggling Areas Has an Overall Positive Impact on Local Communities

AMERICAN GAMING ASSOCIATION* Base: Among Americans (n=2,002)

Q23a: The following phrases describe the impacts some people argue the casino gaming industry brings to state and local economies across the country. For each one, please indicate how well you think it describes the casino gaming industry.

: : : Americans Identify Jobs as the Most Significant Benefit Casinos Provide Local Communities

AMONG THE MOST IMPORTANT The Jobs Casinos Create 73% The Tourism Casinos Attract 61% The Taxes Casinos Pay 57% The Entertaining and Dining 47% **Options Casinos Bring** 0% 10% 20% 30% 40% 50% 60% 70% 80%

CASINO COMMUNITY BENEFITS RANKED

73%

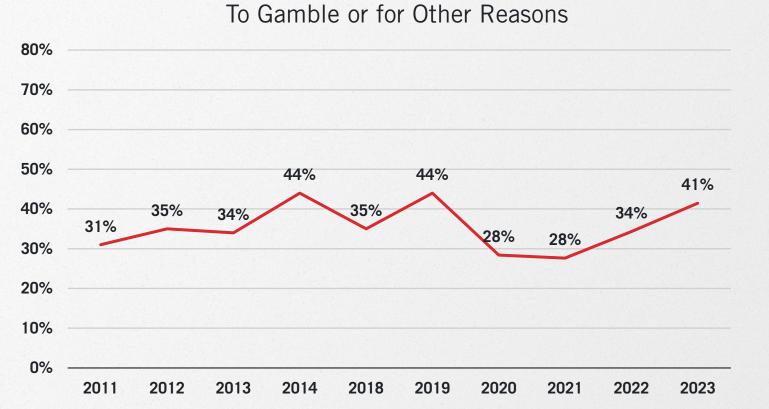
Nearly three-fourths rank job creation among the top three benefits that casinos provide to communities, 29% considering it the most important benefit.



Base: Among Americans (n=2,002)

Q23c: Regardless of whether or not your state has casino gaming, which of the following benefits do you believe are most beneficial to the communities where casinos operate? Please rank your top three choices with "1" being the most beneficial.

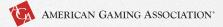
::: Past-Year Casino Visitation Returns to Pre-Pandemic Trend Level



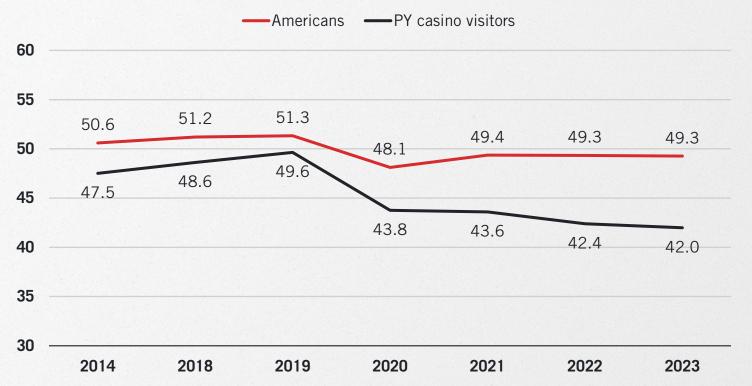
PAST-YEAR CASINO VISITATION

102M

U.S. adults visited a casino for gambling or other purposes in the past 12 months.



Base: Among Americans (n=2,002) Q10: Have you visited a casino in the last 12 months - whether it was to gamble or for some other reason? The "Don't know" response option was removed after the 2019 survey. : Average Casino Visitor Age Drops for Fourth Year



PY CASINO VISITOR MEAN AGE

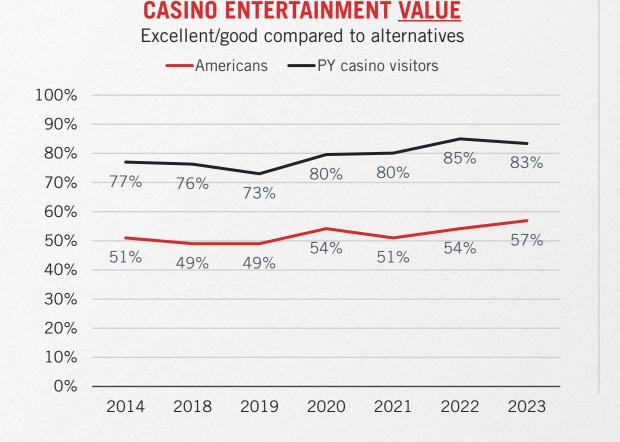
61%

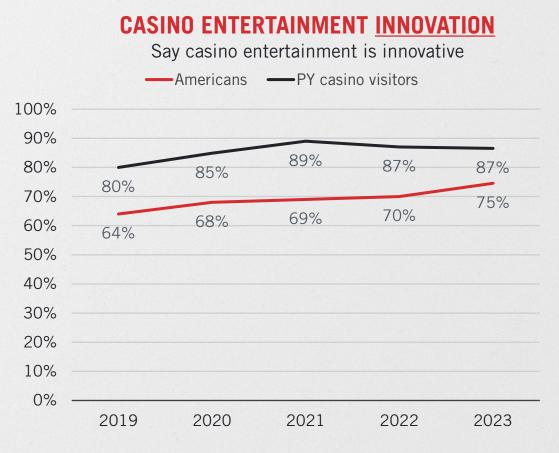
Three-fifths of young adults (21-39) visited a casino for gambling or other purposes in the past 12 months.

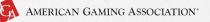


Base: Among Americans (n=2,002), past-year casino visitors (n=830) Q10: Have you visited a casino in the last 12 months - whether it was to gamble or for some other reason? The "Don't know" response option was removed after the 2019 survey.

: : : Americans: Casinos Remain Innovative and Provide Good Entertainment Value for Guests







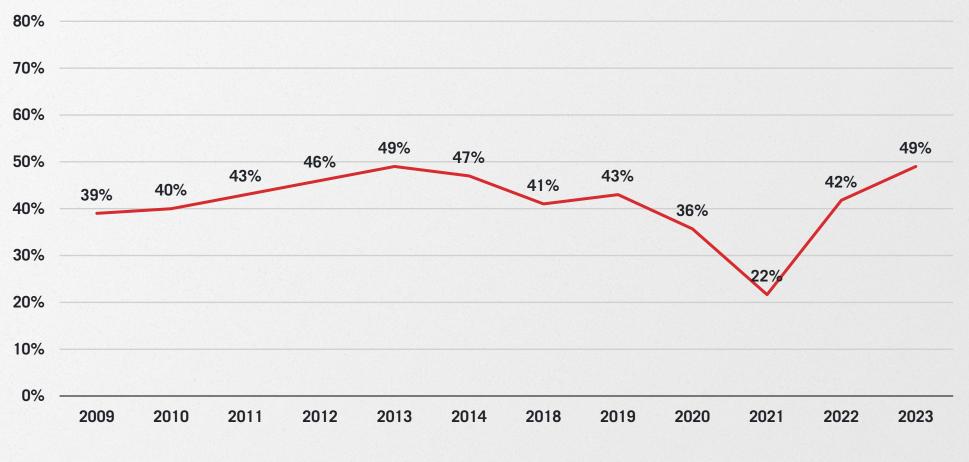
Base: Among Americans (n=2,002), past-year casino visitors (n=830)

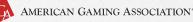
Q23. When you think about going to a casino for an evening out, how good of a value for your money is it compared to other entertainment options you might enjoy? Would you say it is...? Q31. For each word or phrase, indicate how well you think it describes the casino gaming industry. The "Don't know" response option was removed after the 2019 survey.

: : : Gambling Participation Reaches Highest Level Since 2013

PAST-YEAR GAMBLING PARTICIPATION

Across All Game Types (casino, sports betting, iGaming, lottery, pari-mutuel, VLT)





Base: Among Americans (n=2,002)

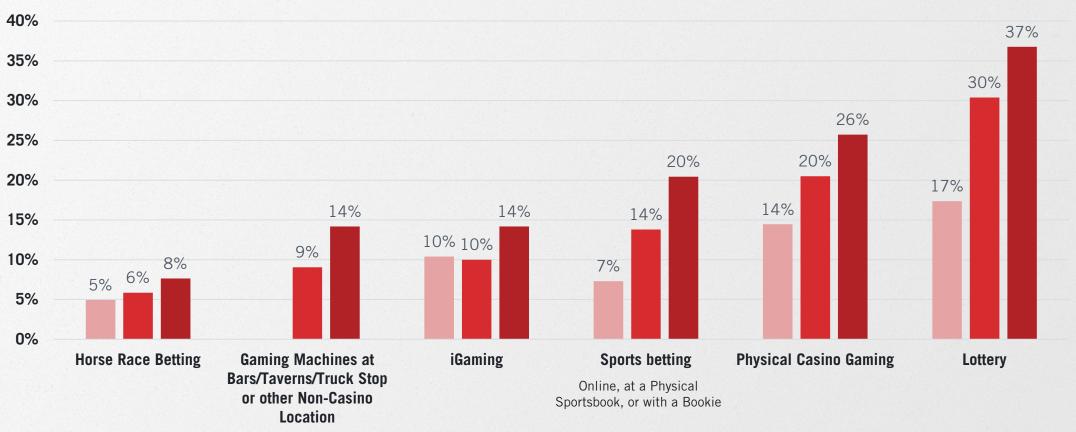
Q8a: Have you participated in any form of gambling at all during the past 12 months, whether at a casino or racetrack, at a sportsbook, a lottery location, at a bar, tavern, truck stop or any other non-casino location, or over the Internet?

: : : Participation Increases Across All Gambling Activities

PAST-YEAR GAMBLING PARTICIPATION

Participation by type of gambling

2021 2022 2023



Q9: Below is a list of several types of gambling. After each one, please indicate if you have participated in that particular form of gambling in the last 12 months.