

Report on the State of Gaming Globally

The "Global casino and gaming industry" registered a growth rate of 3% in 2008 and a decline of 2.4% in 2009. January 2010 to September 2011, the overall industry has continued to grow at a slower growth rate of 2.2% globally. It is expected that gaming and gambling market will reach USD billions by 2015.



- For the period 2004-2009, the gambling industry recorded a CAGR of 3.58%. The industry is expected to grow at a CAGR of 3.91% from 2010-2015. The global online gaming market has grown at a CAGR of 18.21% during the period 2002-2010.
- The global online gaming market is expected to grow at a CAGR of 5.7% from 2008 to 2012. There are significant opportunities for growth in the USA lottery market
- In 2009, Asian casinos grew by 3.41% and showed positive growth in the first half of 2010 (2.88%) as compared to the same period in 2009.
- The Macau casino sector delivered to its shareholders billions of dollars of revenue in 2010. In 2009, Macau slot machines generated 5.45% of the total revenue generated from gambling. So tables games were far more profitable. The major revenue stream is different that USA casinos which total slot number revenue were a much higher percentage of total revenue.
- Singapore casino revenue grew by 29.72% in 2010 compared to results in 2009. The Singapore casinos are expected to reach USD 6.68 billion by 2015
- The annual lottery revenue in China has expanded from USD 2.18 billion in 2000 to USD 24.52 billion in 2010 at a CAGR 27.38%.

- China's lottery market is estimated to reach USD 46.0 billion by 2015, implying a CAGR of 11.06% from 2010. China market for Welfare computer ticket games is also growing and is expected to cross USD 16 billion by 2012
- Macau casino and gaming revenue will grow by 20.48% in 2011. Macau casino and gaming revenue is expected to grow at a CAGR of 15.77% till 2015.
- In 2010, British gambling industry generated gross gambling yield (GGY) of USD billions as compared to GGY of USD in 2009. The non-remote betting sector represents the largest market within the industry.
- Between 2009-2012, European E-gaming industry's gross gambling yield is expected to grow at a CAGR of 7.63%. E-gaming is the fastest growing market led by awareness among young population and expected increase in per capita income after the economic jolt in 2008 to now.
- The USA gambling and gaming sector generated total revenues in 2009, representing a compound annual growth rate (CAGR) of 4.14% for the period spanning from 2000-2009.

Conclusion:

Despite the improvements expected in 2011, the performance of the USA gaming and gambling sector is forecasted to grow at a slow rate from 2009 to 2012 compared to historical performance and is expected to catch speed from 2014 onwards. The meltdown in Europe economies is not expected to dampen the European taste for gambling especially online gambling.