

CFG USA National 2025 First Half Special Briefing on Online Gaming: The Perfect Storm Arrives

WASHINGTON, DC, UNITED STATES, January 8, 2026 /EINPresswire.com/ -- The Campaign for Fairer Gambling (CFG) has today released its CFG USA National 2025 First Half - Special Briefing, an update to its landmark CFG USA 2024 Series, warning that the rapid expansion of legal online gambling is fueling more gambling and higher consumer losses – all without displacing crime from the total marketplace. Illegal and unregulated online operators are growing openly and the perfect storm of marketplace dynamics has now arrived and is impacting the legal sector.

The analysis, produced by technical marketplace intelligence platform Yield Sec, recently acquired by Gaming Compliance International (GCI), extends the most comprehensive national and state-by-state breakdown ever produced across the US online gaming marketplace within sports betting, casino and poker. It shows that states with more forms of legal online gaming record the highest Gross Gambling Revenue (GGR) per capita as a percentage of income – but, illegal operators continue to dominate, with 74% of total GGR across US online gambling being stolen by unregulated operators during the 2025 first half year.

Legalization alone has done nothing to reduce and remove illegal and unregulated online gambling. The marketplace simply grows and illegal and unregulated operators become the unintended winners as they exploit their dominant control of cross-sell mechanics, new products like crypto gambling, and their status as the “one-stop gambling shops” for American consumers.

For the six-month period, the total US online gambling marketplace was worth \$52 billion, of which \$38.7 billion (74%) was illegal.

Key findings from the CFG USA National 2025 First Half - Special Briefing: Yield Sec 2024 data and analysis across America showed 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.

Yield Sec highlighted 2025 as a “tipping point year” when actions needed to be taken to stop the steal across American online gaming, for the benefit of American commerce, community and consumers.

In the first half of 2025, the perfect storm arrived across America's online gaming marketplace: •

GGR Market share split is holding steady from full year 2024 to 2025 first half at 74% Illegal and 26% Legal

- The silent death of legal, licensed operators: Legal, licensed online gaming operators have collapsed from 103 in 2023, to 95 in 2024 to just 57 by the end of the first half of 2025
- Audience Exposure: 82% of what audiences see when they look for online gaming across the USA ecosystem is promoting illegal, unregulated gambling
- Product: The explosive impact of unregulated and illegal crypto gambling is a deeply concerning factor in the changing landscape of American online gaming. Yield Sec analysis for the first half year 2025 value of crypto gambling in America shows this rapidly growing segment of the illegal sector accounting for 28% of the total USA marketplace GGR, and 37% of the illegal-only GGR, at \$14.4 billion. A shocking 43% of audience exposure is for illegal and unregulated crypto gambling – it has simply seduced the American audience into believing a winning lie. Crypto gambling is driving greater frequency of play, at much higher stake sizes than have ever been witnessed in the traditional legal or illegal online sectors
- Illegals dominate in America for four reasons: 1) Cross-sell from sports betting to casino, and more products, controls GGR and growth 2) Illegals control the mass market presence of cross sell as they feature all the products, at the best prices, and promote them everywhere. 3) The patchwork quilt of legal and regulatory status for products and availability across USA states is being ruthlessly exploited by unregulated, illegal gambling 4) The cross-sell advantage for illegals has allowed them to move America's online gaming ecosystem towards their total control.

GGR Per Capita as a Percentage of Income: The CFG USA National 2025 First Half - Special Briefing considers the 2025 first half year data across GGR Per Capita as a Percentage of Income – a novel metric arrived at by CFG and used in previous state reporting over 2024 (2024 CFG USA State Supplement #2: All States).

This takes into account:

- GGR (the amount lost by consumers) per state
- State population
- State income

This provides the percentage of income lost per state and the Special Briefing makes confident projections for the full year of 2025. These show a change for the whole USA from 2024 of 0.19% being a 31% growth from a 0.62% base. The highest growth percentage is 41.9% in the illegal only states, but this is the smallest change of 0.13% from the lowest base of 0.31%. The largest change is 0.30%, a growth of 27% from the highest base of 1.12% to 1.42% for states with both legal online sports betting and gaming.

The numbers are ominous and demonstrate how any liberalization enacted in 2026 will result in expanding not just the total loss by consumers but also the illegal and unregulated win.

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, contained in CFG reporting over years of monitoring and the most comprehensive studies ever conducted upon the US online gambling marketplace at both the national and state levels, contradicts this

assertion.

Derek Webb, Founder and Funder of CFG, said: "Trade proponents still claim that legalizing online gambling will reduce the illegal online sector. This is false and legal representations to this effect are perjury. There is still no evidence of meaningful action against the black market at either the state or federal level. The numbers show that as the total market continues to grow, illegal operators share in that growth."

Ismail Vali, President of GCI and founder and former CEO of Yield Sec, added: "Legalization alone will not remove or reduce unregulated gambling. Legalization needs monitoring, policing, enforcement and optimization (MPEO), to fulfil the fundamental duty to identify, reduce and remove unregulated gambling across every facet of the ecosystem. As the perfect storm rages across America's online gaming marketplace in 2025, the sense of chaos could not be clearer. Taking back control, at the state and federal levels, and enabling the abilities of legal operators to make the money they should, to benefit American commerce, community and consumers, will only come via one path that must impact policy, process and practice: the path of MPEO – Monitor, Police, Enforce and Optimize. It is the only path which takes America's online gaming marketplace from chaos to control."

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