

National Gaming Market Recap

August 2026 · Gross Gaming Revenue

JSA Analytics · Gaming Analytics Group · Confidential — For Internal Use Only

Reporting basis — complete

- Every market in JSA's national series is carried for August. Absolute national GGR, year-over-year and year-to-date are on a complete, like-for-like basis.
- Kentucky and Oklahoma are carried as JSA estimates; neither had published by the reporting cutoff. Kansas includes a JSA-derived figure for its historical-racing venue, which reports wagers rather than net win.
- Delaware and West Virginia are pro-rated to the calendar month from source periods that do not align with it. Delaware's misalignment is structural and permanent.

\$4.67B NATIONAL GGR · AUGUST	-0.2% NATIONAL YOY	-2.4% SAME-STORE YOY	-0.8% SAME-STORE · DAY-ADJUSTED	+8.5% EXPANDING MARKETS YOY	+3.2% NATIONAL YTD
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National gross gaming revenue was **\$4.67 billion** in August, **-0.2%** against August 2025. Expanding and new-supply markets added **\$81.8M** (+8.5%); same-store markets declined **\$90.1M** (-2.4%). August 2026 carried one fewer Friday than August 2025; adjusted for that calendar, same-store was **-0.8%**.

Executive Summary — August 2026

- Calendar.** August 2026 carried five Saturdays, Sundays and Mondays against August 2025's five Fridays, Saturdays and Sundays — a net one fewer Friday for one additional Monday. On JSA day-of-week weightings that calendar is worth **-1.60%** of a normal month (104.70 against 106.40). Same-store printed **-2.4%**; day-adjusted it was **-0.8%**.
- Supply versus same-store.** Expanding and new-supply markets grew **+8.5%**, **+\$81.8M**. Same-store markets, 78% of national GGR, moved **-\$90.1M**. National net change **-\$8.3M**.
- New York is the largest gain,** **+\$56.7M** (+19.9%); table games account for **+\$44.1M** of it, against a prior year before New York City offered live table games. **Nevada leads same-store** at **+\$38.2M** (+3.1%), slot-led (+6.1% slot, -2.8% table).
- Largest same-store declines:** Indiana **-\$32.2M** (-14.6%) · Iowa **-\$19.8M** (-13.1%) · Mississippi **-\$19.2M** (-8.9%) · Pennsylvania **-\$17.4M** (-5.8%) · New Jersey **-\$16.7M** (-5.4%).
- Table games led the same-store decline:** same-store table **-6.2%** against slot **-0.9%** (split-reporting markets). Pennsylvania table **-18.1%** · Maryland table **-13.2%** · Missouri table **-17.7%**.
- Year to date,** national GGR is **+3.2%** at **\$37.30B**; same-store **+1.4%**, expanding **+10.2%**.

1. Same-Store GGR — August 2026 YoY

Same-store markets only. Expanding and new-supply markets are excluded so the comparison reflects like-for-like performance rather than added capacity. Ohio is carried as two rows throughout this report — its racino segment and its commercial casino segment are separately regulated, differently taxed businesses that report on different schedules.

State	YoY Change	%	\$ Chng
South Dakota		+8.8%	+\$1.4
Ohio — Casino		+5.5%	+\$4.9
Maine		+3.6%	+\$0.5
Nevada		+3.1%	+\$38.2
Michigan		+3.0%	+\$3.2
Arkansas		+2.6%	+\$1.5
Ohio — Racino		+0.5%	+\$0.7
Colorado		+0.2%	+\$0.2
Delaware		-1.4%	-\$0.6
West Virginia		-1.8%	-\$0.9
Massachusetts		-2.9%	-\$3.1
Connecticut		-3.2%	-\$2.6
Missouri		-3.4%	-\$6.1
Rhode Island		-4.0%	-\$2.3
New Jersey		-5.4%	-\$16.7
Oklahoma (est.)		-5.7%	-\$0.8
Pennsylvania		-5.8%	-\$17.4
Maryland		-6.0%	-\$10.3
Mississippi		-8.9%	-\$19.2
Florida		-10.2%	-\$6.1
New Mexico		-10.2%	-\$2.6
Iowa		-13.1%	-\$19.8
Indiana		-14.6%	-\$32.2

Ranked on total GGR variance against the same month prior year. Oklahoma reflects a JSA estimate.

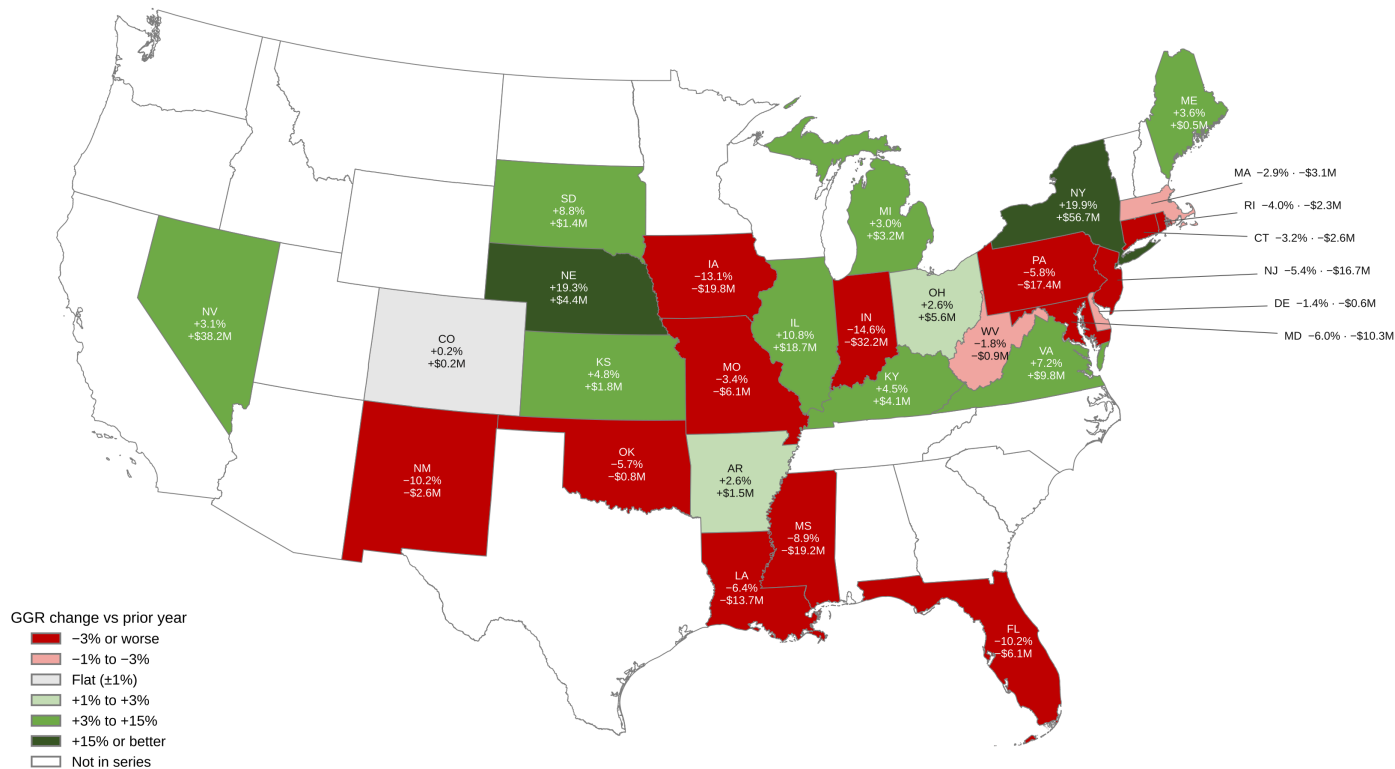
2. State GGR Summary — August 2026

State	Total TY	Total LY	\$ Chng	% Chng	Slot TY	Slot LY	Slot \$ Chng	Slot Δ%	Tbl TY	Tbl LY	Tbl \$ Chng	Tbl Δ%
▶ SAME-STORE STATES												
Arkansas	\$60.2	\$58.7	+\$1.5	+2.6%	\$54.2	\$53.1	+\$1.1	+2.1%	\$6.0	\$5.6	+\$0.4	+7.0%
Colorado	\$104.0	\$103.8	+\$0.2	+0.2%	\$88.5	\$90.5	-\$2.0	-2.2%	\$15.5	\$13.3	+\$2.2	+16.7%
Connecticut	\$79.8	\$82.5	-\$2.6	-3.2%	\$79.8	\$82.5	-\$2.6	-3.2%	—	—	—	—
Delaware	\$39.3	\$39.8	-\$0.6	-1.4%	\$35.6	\$35.3	+\$0.3	+0.7%	\$3.7	\$4.5	-\$0.8	-18.0%
Florida	\$54.0	\$60.1	-\$6.1	-10.2%	\$54.0	\$60.1	-\$6.1	-10.2%	—	—	—	—
Indiana	\$188.0	\$220.2	-\$32.2	-14.6%	\$154.7	\$182.1	-\$27.4	-15.1%	\$33.4	\$38.1	-\$4.8	-12.5%
Iowa	\$131.4	\$151.2	-\$19.8	-13.1%	\$119.7	\$136.7	-\$17.0	-12.4%	\$11.7	\$14.5	-\$2.9	-19.7%
Maine	\$16.0	\$15.4	+\$0.5	+3.6%	\$14.3	\$13.4	+\$0.9	+6.8%	\$1.7	\$2.0	-\$0.4	-17.8%
Maryland	\$160.0	\$170.3	-\$10.3	-6.0%	\$114.8	\$118.2	-\$3.4	-2.9%	\$45.2	\$52.0	-\$6.9	-13.2%
Massachusetts	\$101.9	\$105.0	-\$3.1	-2.9%	\$73.1	\$73.9	-\$0.7	-1.0%	\$28.8	\$31.1	-\$2.3	-7.5%
Michigan	\$108.9	\$105.7	+\$3.2	+3.0%	—	—	—	—	—	—	—	—
Mississippi	\$196.2	\$215.5	-\$19.2	-8.9%	—	—	—	—	—	—	—	—
Missouri	\$171.4	\$177.5	-\$6.1	-3.4%	\$150.2	\$151.8	-\$1.6	-1.0%	\$21.1	\$25.7	-\$4.5	-17.7%
Nevada	\$1,266.1	\$1,227.9	+\$38.2	+3.1%	\$865.7	\$816.1	+\$49.6	+6.1%	\$400.4	\$411.8	-\$11.4	-2.8%
New Jersey	\$292.9	\$309.6	-\$16.7	-5.4%	\$222.4	\$234.3	-\$12.0	-5.1%	\$70.6	\$75.3	-\$4.7	-6.3%
New Mexico	\$23.2	\$25.8	-\$2.6	-10.2%	\$23.2	\$25.8	-\$2.6	-10.2%	—	—	—	—
Ohio — Casino	\$93.9	\$89.0	+\$4.9	+5.5%	\$70.0	\$66.0	+\$4.0	+6.0%	\$23.9	\$23.0	+\$0.9	+3.9%
Ohio — Racino	\$129.0	\$128.3	+\$0.7	+0.5%	\$129.0	\$128.3	+\$0.7	+0.5%	—	—	—	—
Oklahoma (est.)	\$13.2	\$14.0	-\$0.8	-5.7%	\$13.2	\$14.0	-\$0.8	-5.7%	—	—	—	—
Pennsylvania	\$280.3	\$297.7	-\$17.4	-5.8%	\$213.9	\$216.6	-\$2.7	-1.3%	\$66.4	\$81.1	-\$14.7	-18.1%
Rhode Island	\$55.1	\$57.4	-\$2.3	-4.0%	\$44.2	\$46.7	-\$2.5	-5.4%	\$10.9	\$10.6	+\$0.2	+2.3%
South Dakota	\$16.9	\$15.5	+\$1.4	+8.8%	\$15.1	\$13.8	+\$1.3	+9.6%	\$1.8	\$1.8	+\$0.0	+2.0%
West Virginia	\$46.9	\$47.7	-\$0.9	-1.8%	\$38.9	\$39.9	-\$0.9	-2.4%	\$8.0	\$7.9	+\$0.1	+1.0%
▶ SAME-STORE SUBTOTAL	\$3,628.5	\$3,718.6	-\$90.1	-2.4%	\$2,574.5	\$2,599.1	-\$24.6	-0.9%	\$748.9	\$798.3	-\$49.4	-6.2%
★ EXPANDING / NEW-SUPPLY STATES — excluded from same-store												
Illinois	\$192.8	\$174.0	+\$18.7	+10.8%	\$146.6	\$137.0	+\$9.6	+7.0%	\$46.2	\$37.0	+\$9.1	+24.6%
Kansas (est.)	\$39.1	\$37.3	+\$1.8	+4.8%	\$34.8	\$33.3	+\$1.5	+4.6%	\$4.3	\$4.0	+\$0.3	+6.2%
Kentucky (est.)	\$95.5	\$91.4	+\$4.1	+4.5%	\$95.5	\$91.4	+\$4.1	+4.5%	—	—	—	—
Louisiana	\$201.0	\$214.7	-\$13.7	-6.4%	—	—	—	—	—	—	—	—
Nebraska	\$27.1	\$22.7	+\$4.4	+19.3%	\$24.8	\$20.7	+\$4.2	+20.3%	\$2.3	\$2.1	+\$0.2	+10.2%
New York	\$341.4	\$284.8	+\$56.7	+19.9%	\$280.8	\$268.3	+\$12.5	+4.7%	\$60.6	\$16.5	+\$44.1	+267.6%
Virginia	\$145.5	\$135.7	+\$9.8	+7.2%	\$123.7	\$116.4	+\$7.3	+6.3%	\$21.8	\$19.2	+\$2.5	+13.1%
★ EXPANDING SUBTOTAL	\$1,042.4	\$960.7	+\$81.8	+8.5%	\$706.3	\$667.0	+\$39.3	+5.9%	\$135.1	\$78.9	+\$56.2	+71.3%
■ GRAND TOTAL	\$4,670.9	\$4,679.2	-\$8.3	-0.2%	\$3,280.8	\$3,266.1	+\$14.7	+0.5%	\$884.0	\$877.2	+\$6.8	+0.8%

Figures in \$ millions. Slot and table columns are shown only where a market publishes a split covering the whole market; markets reporting a combined figure, or splitting only part of their licensee base, show "—". Slot and table subtotals are column totals across the markets that report each split, so they do not sum to the Total column. Shaded rows carry a JSA-derived component.

National GGR — August 2026 vs August 2025

Change in gross gaming revenue by state



Source: state regulatory filings; JSA Analytics. Ohio shown combined (racino + commercial). Kentucky and Oklahoma are JSA estimates. Land-based slot and table GGR.

Shaded on the year-over-year % change rounded to one decimal, the figure printed on each state. Ohio is shown combined on the map; the tables carry its racino and commercial segments separately, and the two agree.

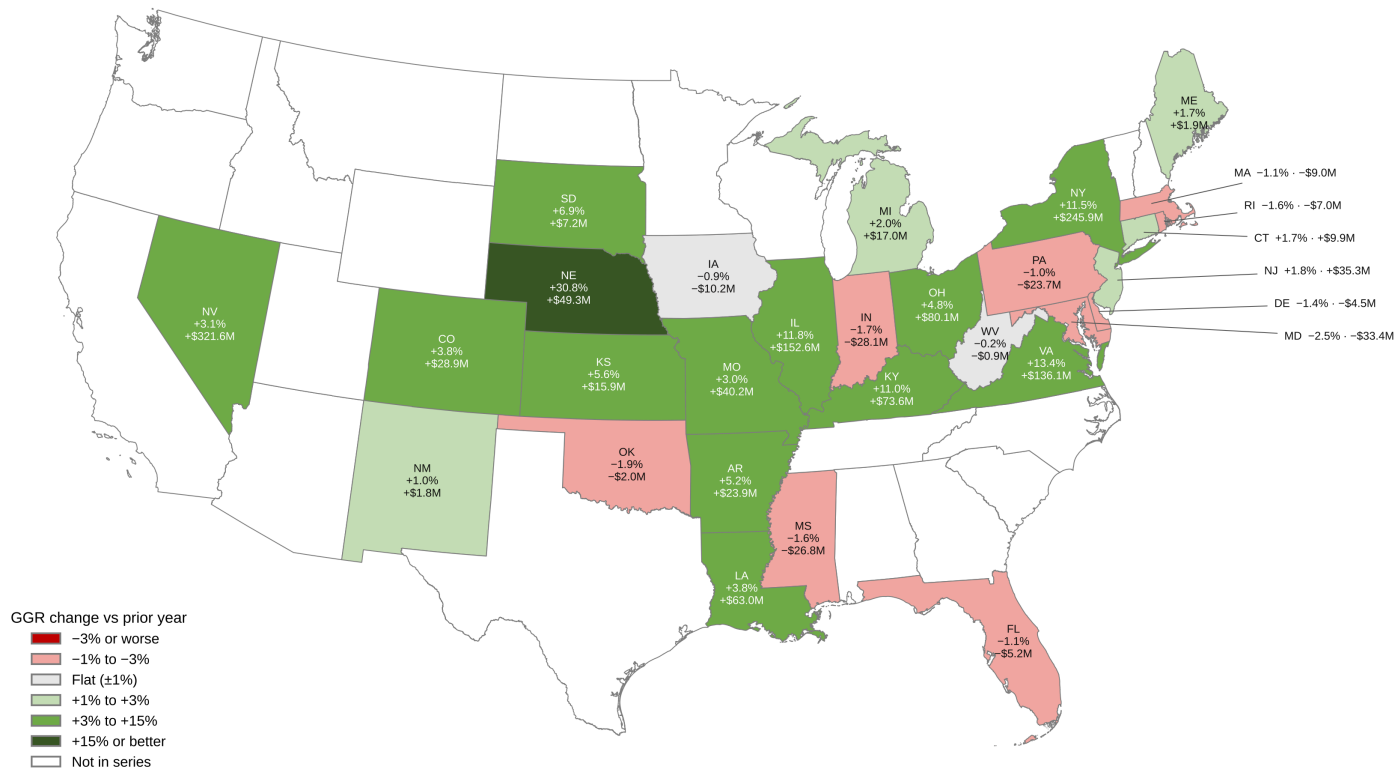
2b. State GGR — Jan–Aug Year to Date · 2026 vs 2025

State	Total TY	Total LY	\$ Chng	% Chng	Slot TY	Slot LY	Slot \$ Chng	Slot Δ%	Tbl TY	Tbl LY	Tbl \$ Chng	Tbl Δ%
▶ SAME-STORE STATES												
Arkansas	\$481.7	\$457.8	+\$23.9	+5.2%	\$436.2	\$410.9	+\$25.3	+6.1%	\$45.5	\$46.9	-\$1.4	-2.9%
Colorado	\$785.6	\$756.7	+\$28.9	+3.8%	\$668.0	\$647.6	+\$20.4	+3.2%	\$117.6	\$109.1	+\$8.5	+7.8%
Connecticut	\$596.0	\$586.1	+\$9.9	+1.7%	\$596.0	\$586.1	+\$9.9	+1.7%	—	—	—	—
Delaware	\$310.8	\$315.3	-\$4.5	-1.4%	\$279.1	\$281.1	-\$2.1	-0.7%	\$31.7	\$34.1	-\$2.4	-7.1%
Florida	\$471.7	\$477.0	-\$5.2	-1.1%	\$471.7	\$477.0	-\$5.2	-1.1%	—	—	—	—
Indiana	\$1,623.6	\$1,651.7	-\$28.1	-1.7%	\$1,362.4	\$1,365.3	-\$2.9	-0.2%	\$261.2	\$286.5	-\$25.3	-8.8%
Iowa	\$1,128.3	\$1,138.4	-\$10.2	-0.9%	\$1,023.9	\$1,031.6	-\$7.7	-0.7%	\$104.4	\$106.8	-\$2.4	-2.3%
Maine	\$114.0	\$112.1	+\$1.9	+1.7%	\$99.2	\$95.4	+\$3.8	+4.0%	\$14.8	\$16.7	-\$2.0	-11.7%
Maryland	\$1,281.3	\$1,314.7	-\$33.4	-2.5%	\$906.8	\$912.7	-\$5.9	-0.7%	\$374.6	\$402.0	-\$27.5	-6.8%
Massachusetts	\$797.1	\$806.1	-\$9.0	-1.1%	\$577.3	\$567.1	+\$10.2	+1.8%	\$219.8	\$239.1	-\$19.2	-8.0%
Michigan	\$868.3	\$851.3	+\$17.0	+2.0%	—	—	—	—	—	—	—	—
Mississippi	\$1,617.3	\$1,644.1	-\$26.8	-1.6%	—	—	—	—	—	—	—	—
Missouri	\$1,360.6	\$1,320.4	+\$40.2	+3.0%	\$1,182.7	\$1,128.5	+\$54.2	+4.8%	\$177.8	\$191.6	-\$13.8	-7.2%
Nevada	\$10,693.8	\$10,372.2	+\$321.6	+3.1%	\$7,271.1	\$7,029.6	+\$241.5	+3.4%	\$3,422.7	\$3,342.6	+\$80.1	+2.4%
New Jersey	\$1,996.5	\$1,961.2	+\$35.3	+1.8%	\$1,477.9	\$1,458.1	+\$19.8	+1.4%	\$518.6	\$503.1	+\$15.5	+3.1%
New Mexico	\$192.2	\$190.4	+\$1.8	+1.0%	\$192.2	\$190.4	+\$1.8	+1.0%	—	—	—	—
Ohio — Casino	\$721.0	\$694.3	+\$26.7	+3.8%	\$537.5	\$507.9	+\$29.6	+5.8%	\$183.5	\$186.4	-\$2.9	-1.5%
Ohio — Racino	\$1,012.7	\$959.4	+\$53.4	+5.6%	\$1,012.7	\$959.4	+\$53.4	+5.6%	—	—	—	—
Oklahoma (est.)	\$106.2	\$108.2	-\$2.0	-1.9%	\$106.2	\$108.2	-\$2.0	-1.9%	—	—	—	—
Pennsylvania	\$2,247.2	\$2,270.9	-\$23.7	-1.0%	\$1,660.4	\$1,649.0	+\$11.3	+0.7%	\$586.9	\$621.9	-\$35.0	-5.6%
Rhode Island	\$429.1	\$436.1	-\$7.0	-1.6%	\$348.0	\$353.3	-\$5.3	-1.5%	\$81.1	\$82.8	-\$1.7	-2.1%
South Dakota	\$111.7	\$104.5	+\$7.2	+6.9%	\$100.3	\$93.2	+\$7.1	+7.6%	\$11.4	\$11.3	+\$0.1	+0.8%
West Virginia	\$375.9	\$376.8	-\$0.9	-0.2%	\$311.0	\$310.6	+\$0.4	+0.1%	\$64.9	\$66.2	-\$1.4	-2.1%
▶ SAME-STORE SUBTOTAL	\$29,322.6	\$28,905.7	+\$416.9	+1.4%	\$20,620.5	\$20,162.9	+\$457.6	+2.3%	\$6,216.5	\$6,247.1	-\$30.6	-0.5%
★ EXPANDING / NEW-SUPPLY STATES — excluded from same-store												
Illinois	\$1,448.6	\$1,296.0	+\$152.6	+11.8%	\$1,101.7	\$990.4	+\$111.3	+11.2%	\$346.9	\$305.6	+\$41.3	+13.5%
Kansas (est.)	\$300.3	\$284.4	+\$15.9	+5.6%	\$266.9	\$250.3	+\$16.5	+6.6%	\$33.4	\$34.1	-\$0.7	-1.9%
Kentucky (est.)	\$744.4	\$670.8	+\$73.6	+11.0%	\$744.4	\$670.8	+\$73.6	+11.0%	—	—	—	—
Louisiana	\$1,741.5	\$1,678.5	+\$63.0	+3.8%	—	—	—	—	—	—	—	—
Nebraska	\$209.4	\$160.1	+\$49.3	+30.8%	\$191.3	\$144.5	+\$46.8	+32.4%	\$18.1	\$15.6	+\$2.5	+15.9%
New York	\$2,378.9	\$2,133.0	+\$245.9	+11.5%	\$2,109.2	\$2,016.6	+\$92.6	+4.6%	\$269.7	\$116.4	+\$153.4	+131.8%
Virginia	\$1,155.4	\$1,019.3	+\$136.1	+13.4%	\$966.0	\$856.6	+\$109.4	+12.8%	\$189.4	\$162.7	+\$26.7	+16.4%
★ EXPANDING SUBTOTAL	\$7,978.6	\$7,242.1	+\$736.5	+10.2%	\$5,379.5	\$4,929.3	+\$450.2	+9.1%	\$857.6	\$634.3	+\$223.2	+35.2%
■ GRAND TOTAL	\$37,301.2	\$36,147.8	+\$1,153.4	+3.2%	\$26,000.0	\$25,092.2	+\$907.8	+3.6%	\$7,074.0	\$6,881.4	+\$192.6	+2.8%

Figures in \$ millions, January through August both years. Same conventions as the monthly table.

National GGR — Jan–Aug 2026 vs Jan–Aug 2025

Year-to-date change in gross gaming revenue by state



Source: state regulatory filings; JSA Analytics. Ohio shown combined (racino + commercial). Kentucky and Oklahoma are JSA estimates. Land-based slot and table GGR.

Shaded on the year-to-date % change rounded to one decimal. Ohio shown combined, as above.

3. Free Play ROI — Slot Promotional-Credit Efficiency by Market

Free Play ROI is slot win divided by promotional credits, computed on a **matched-pair basis** — promotional credits and slot win taken from the same properties, never a market's full slot win against a partial promotional figure. A higher multiple means more slot win earned per dollar of promotional credit issued. Markets whose regulators do not publish promotional credits are not shown.

State	Promotional Credits	Slot Win (matched properties)	Free Play ROI	Prior Year	Δ
New York	\$25.8	\$280.8	10.89×	12.54×	-1.64
Connecticut	\$8.9	\$79.8	8.93×	9.62×	-0.69
South Dakota	\$1.8	\$15.1	8.31×	7.54×	+0.77
Ohio — Racino	\$23.6	\$129.0	5.47×	5.62×	-0.15
New Jersey	\$43.6	\$222.4	5.09×	5.32×	-0.23
Ohio — Casino	\$14.4	\$70.0	4.88×	4.98×	-0.10
West Virginia	\$9.8	\$38.9	3.97×	4.47×	-0.50
Pennsylvania	\$55.8	\$213.9	3.83×	3.87×	-0.03
Florida	\$15.5	\$54.0	3.48×	4.17×	-0.69

Figures in \$ millions. Ranked high to low on current-month ROI. Prior-year column on the same matched-pair basis.

Nevada — slot win by denomination

- Statewide slot win \$865.7M, +6.1% against August 2025, at a 6.89% win percent.
- Multi-denomination win +10.6% to \$696.4M on 91,906 units, 6.75% win percent.
- 1-cent win –12.5% to \$108.5M on 25,838 units, 8.58% win percent.
- Other lines: 5-cent +5.8% · 25-cent –5.6% · \$1 –2.7% · \$5 –4.3% · \$25 –5.1% · \$100 –182.3% (as published).
- Multi-denomination accounted for 80.4% of statewide slot win and 72.9% of reporting units.
- Against the trailing twelve-month average unit count: multi-denomination 91,906 versus 89,220; 1-cent 25,838 versus 27,773.
- *Reported as observed. JSA is tracking the denomination mix forward and is not drawing conclusions from a single month.*

Methodology & Basis Notes**Basis and comparability**

- **Complete basis.** Every market in the series is carried for August, with two on JSA estimates, so absolute national GGR, YoY and YTD are all like-for-like this month.
- **Scope.** Land-based slot and table gross gaming revenue. Sports wagering and internet gaming are excluded throughout. Poker is excluded where a regulator breaks it out separately, and included by standing exception in a small number of markets whose published table line bundles it.
- **Same-store versus expanding.** Markets that added, opened or materially expanded capacity within the comparison window are reported separately so same-store growth is not flattered by new supply.
- **Calendar adjustment.** Day-adjusted figures normalize for weekday composition using JSA day-of-week weightings, in which Fridays and Saturdays run roughly 1.3 to 1.4 times an average day. August 2026 indexed 104.70 against August 2025's 106.40, a –1.60% calendar headwind.
- **Estimates.** Kentucky and Oklahoma are JSA estimates built from the most recent actual month and the prior-year comparable, both adjusted for weekday composition. Kansas includes a JSA-derived figure for a historical-racing venue whose regulator publishes wagers rather than net win. Estimated rows are included in totals and flagged; they are excluded from precision work.
- **Pro-rated markets.** Delaware and West Virginia report on fiscal or weekly periods that do not align to the calendar month and are pro-rated on day-of-week weightings. Delaware's thirteen-period fiscal calendar means a calendar-month figure is never published there, so its pro-ration is permanent method, not a provisional estimate. Every other market in this report, New York included, is sourced full calendar month.
- **Splits.** Slot and table detail is shown only where the published split covers a whole market. Markets publishing a combined figure, or splitting only part of their licensee base, show “—” rather than a partial figure that would read as the whole.
- **Free Play ROI** is computed matched-pair, promotional credits and slot win from the same properties.
- **Restatement.** Figures restate as regulators revise. JSA does not chase prior-period revisions in markets where the published year-ago base moves after the fact; variances are computed against JSA's stored history.

Sources: state regulatory filings and published monthly gaming revenue reports; property-furnished figures where a regulator does not publish at property level; JSA Analytics internal data and estimates as noted.