

# 2017 Year In Review

## The Performance Of New Jersey's Legal Online Casinos



# Introduction

2017 was a transformative year for New Jersey’s regulated online casino sites. The market notched several milestones while definitively establishing that regulated online gambling contributes to growth at land-based casinos.

Revenue growth was accompanied by other forms of growth, including the addition of new brands to the market (MGM) and new games designed to broaden the appeal of regulated online gambling (live dealer games, virtual sports).

We expect New Jersey will continue to grow this year, albeit at a reduced rate as the market approaches a more mature state. The introduction of additional brands, new games, and improved payment methods will all help to lift revenue in 2018 to a new record.

## Contents

2017 market overall.....	3	Resorts.....	7
Borgata .....	4	Tropicana .....	8
Caesars .....	5	Overview .....	9
Golden Nugget .....	6		



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Chris Grove is a gambling industry strategist based in Las Vegas. He oversees trade publications focused on the regulated online gambling, esports, and daily fantasy sports industries. Grove has been cited as an expert voice by lawmakers, regulators, and outlets such as the New York Times, the Washington Post, ESPN, Frontline, CNBC, MSNBC, Bloomberg, and the Wall Street Journal.

# 2017 market overall

- Market grew 25% year-over-year.
- Casino accounted for 90% of revenue.
- Casino grew 30% year-over-year, while poker declined 8.5%.

## 2017 Revenue (in millions)

POKER	CASINO	TOTAL
<b>\$24.3</b>	<b>\$221.3</b>	<b>\$245.6</b>

## Revenue since launch (in millions)

POKER	CASINO	TOTAL
<b>\$107</b>	<b>\$615</b>	<b>\$722</b>

## Notable

- Crossed half-billion dollar mark lifetime revenue during 2017.
- Operators generated \$43 million in total taxes for the state.
- Market was above \$20 million for 10 out of 12 months.

## TOTAL TAX REVENUE COLLECTED SINCE LAUNCH

**\$126.5**  
million



## 2017 Recap

- Peak casino revenue month was \$3.7 million in revenue, peak poker was \$676k.
- Casino grew 8.5% year-over-year, poker declined 18%.
- Ranked #3 for casino revenue in 2017, #2 for poker revenue.

**Affiliated online brands:** Borgata, MGM, Party, Pala

## 2017 Revenue (in millions)

**POKER**

**\$7.5**

**CASINO**

**\$41**

**TOTAL**

**\$48.5**

## Revenue since launch (in millions)

**POKER**

**\$46.6**

**CASINO**

**\$141.5**

**TOTAL**

**\$188.2**

## Notable

- Saw the launch of the MGM online casino and poker brand in July 2017.
- Continues to be lifetime leader in total revenue (casino + poker).
- Has largest stable of consumer-facing casino brands.

**TOTAL CASINO GAMES  
AVAILABLE**

**255**



## 2017 Recap

- Peak casino revenue month was \$3.8 million in revenue, peak poker was \$713k.
- Casino grew 20% year-over-year, poker declined 19%.
- Ranked #4 for casino revenue in 2017, #3 for poker revenue.

**Affiliated online brands:** 888, Caesars, Harrah's, WSOP

### 2017 Revenue (in millions)

**POKER**

**\$7**

**CASINO**

**\$36**

**TOTAL**

**\$43**

### Revenue since launch (in millions)

**POKER**

**\$40.7**

**CASINO**

**\$106.9**

**TOTAL**

**\$147.6**

### Notable

- Drew significant momentum from land-based crossover promotions.
- WSOP online poker brand poised to benefit from player pooling with NV / DE.
- 888 brand saw significant game expansion at end of year.

**TOTAL CASINO GAMES AVAILABLE**

**388**



## 2017 Recap

- Peak casino revenue month was \$6.2 million in revenue.
- Casino grew 62% year-over-year.
- Ranked #1 for casino revenue in 2017.

**Affiliated online brands:** Betfair, Golden Nugget, SugarHouse

### 2017 Revenue (in millions)

**POKER**

—

**CASINO**

**\$68.6**

**TOTAL**

**\$68.6**

### Revenue since launch (in millions)

**POKER**

—

**CASINO**

**\$154.9**

**TOTAL**

**\$154.9**

### Notable

- Was the first operator to launch virtual sports (via the SugarHouse brand).
- Took lifetime lead in casino revenue in 2017, surpassing Borgata.
- Substantially expanded live dealer games lineup during 2017.

**TOTAL CASINO GAMES AVAILABLE**

**463**



## 2017 Recap

- Peak casino month was \$3.3 million in revenue, peak poker \$948k.
- Casino grew 44% year-over-year, poker grew 12%.
- Ranked #5 for casino revenue in 2017, #1 for poker revenue.

**Affiliated online brands:** PokerStars, Mohegan Sun, Resorts

## 2017 Revenue (in millions)

**POKER**

**\$9.8**

**CASINO**

**\$33.2**

**TOTAL**

**\$42.9**

## Revenue since launch (in millions)

**POKER**

**\$18.5**

**CASINO**

**\$63**

**TOTAL**

**\$81.5**

## Notable

- Continues to be very competitive online despite small land-based customer base.
- Ended 2017 with the largest slot library of all NJ online casinos.
- Only online casino operator to launch a daily fantasy sports product.

**TOTAL CASINO GAMES AVAILABLE**

**460**



## 2017 Recap

- Peak casino revenue month was \$4 million in revenue.
- Casino grew 15% year-over-year.
- Ranked #2 for casino revenue in 2017.

**Affiliated online brands:** Tropicana, Virgin

### 2017 Revenue (in millions)

**POKER**

—

**CASINO**

**\$42.5**

**TOTAL**

**\$42.5**

### Revenue since launch (in millions)

**POKER**

—

**CASINO**

**\$135.5**

**TOTAL**

**\$135.5**

### Notable

- Smallest number of consumer-facing online casino brands (two).
- Only online casino to offer loss rebate for new players instead of deposit bonus.
- Has focused primarily on core casino games and bingo.

**TOTAL GAMES**

**202**

# Overview

		2017	2016	Difference
<b>Borgata</b>	Poker	\$ 7,498,076	\$ 9,190,069	-18.41%
	Casino	\$ 41,039,968	\$ 37,824,967	8.50%
	Overall	\$ 48,538,044	\$ 47,015,036	3.24%
<b>Caesars</b>	Poker	\$ 6,980,822	\$ 8,601,046	-18.84%
	Casino	\$ 36,020,705	\$ 30,098,288	19.68%
	Overall	\$ 43,001,527	\$ 38,699,334	11.12%
<b>Golden Nugget</b>	Overall	\$ 68,568,498	\$ 42,249,830	62.29%
<b>Resorts</b>	Poker	\$ 9,780,563	\$ 8,720,510	12.16%
	Casino	\$ 33,166,928	\$ 23,041,329	43.95%
	Overall	\$ 42,947,491	\$ 31,761,839	35.22%
<b>Tropicana</b>	Overall	\$ 42,550,422	\$ 36,983,288	15.05%
<b>Overall market</b>	Poker	\$ 221,346,521	\$ 170,197,702	30.05%
	Casino	\$ 24,259,461	\$ 26,511,625	-8.50%
	Overall	\$ 245,605,982	\$ 196,709,327	24.86%



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