

Casino Gaming Equipment Market Report by Product Type (Slot Machines, Video Lottery Terminal, Video Poker Machines, and Others), Installation (Installed Inside Casino, Installed Outside Casino), Mode of Operation (Floor Mounted, Portable), End User (Casinos, Malls, Leisure Centers, and Others), and Region 2024-2032

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Abstracts

The global casino gaming equipment market size reached US\$ 11.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 14.8 Billion by 2032, exhibiting a growth rate (CAGR) of 2.53% during 2024-2032. The rising disposable income of consumers, the legalization of gambling activities, rapid advancements in technology, emergence of mobile gaming platforms, rising tourism sector, and the incorporation of technology in gaming equipment are some of the major factors propelling the market.

Casino gaming equipment encompasses an array of tools and machines used to facilitate and conduct games in casinos. It includes slot machines, poker tables, roulette wheels, blackjack tables, chips, playing cards, dice, video poker machines, and electronic table games. Casino gaming equipment is employed in various applications, from traditional casinos and cruise ships to online gaming platforms and charity events. The numerous benefits of casino gaming equipment include enhanced player experience, fair play opportunity, durability, easy maintenance, and aesthetic appeal. Additionally, the advanced features of the equipment, like electronic interfaces and automated systems, offer better game tracking, higher security, and efficient management.

The escalating disposable income of consumers and the growing interest in leisure activities are major factors driving the market growth. Moreover, the legalization of gambling activities across the globe, offering new opportunities for equipment manufacturers, is stimulating the market growth. Besides this, rapid advances in technology, such as the introduction of electronic and smart casino equipment featuring radio-frequency identification (RFID) chips and touch-screen interfaces, adding a layer of security and sophistication to casino operations, are anticipated to drive the market growth. Additionally, the growing tourism sector and the integration of casinos into luxury hotels and resorts are also acting as another growth-inducing factor. Furthermore, the incorporation of technology into gaming equipment, such as three-dimensional (3D) graphics and virtual reality (VR), providing immersive environments for players is offering lucrative opportunities for the market growth.

Casino Gaming Equipment Market Trends/Drivers:

Legalization and regulation of gambling activities

The legalization and regulation of gambling activities across the globe, removing the stigma associated with gambling and making it a mainstream leisure activity, is providing a stimulus to the market growth. Moreover, the increasing need for high-quality equipment that meets regulatory frameworks with standards and guidelines for casino operators is favoring the market growth. Along with this, the coincidence of legalization with advancements in gaming measures, as manufacturers are required to build features that promote responsible gambling using slot machines or advanced identification checks, is promoting the market growth. Furthermore, the implementation of legal frameworks that establish licensing systems, legitimizing the industry, is favoring the market growth. Licensed casinos are viewed as reputable establishments, attracting a broader range of customers from diverse backgrounds, leading to an increasing demand for better-quality gaming equipment.

Rapid advances in technology

The increasing technological innovation in casino gaming equipment, such as electronic systems, RFID technology for chips, touch-screen interfaces, and digital payment options that revolutionize traditional casino games, making them more secure, efficient, and appealing to players, is providing remunerative growth opportunities for the market. Moreover, the integration of smart systems allows for easier tracking of gameplay, improving the management of both revenue and security, which, in turn, is propelling the market growth. In addition to this, rapid innovations like three-dimensional (3D) graphics and virtual reality (VR), setting the stage for even more interactive and

engaging casino environments, are acting as major factors catalyzing the market growth. Along with this, the introduction of high-tech advancements, which allow the development of multi-game platforms where players can engage in different games on a single machine, is supporting the market growth.

Growing tourism sector across the globe

The symbiotic relationship between the tourism sector and the casino industry is one of the major factors boosting the casino gaming equipment market. In line with this, the widespread integration of casinos in luxury hotels and resorts, serving as additional attractions that draw in tourists, is stimulating the market growth. Moreover, the increasing demand for top-of-the-line gaming equipment in these establishments to match their high-end atmosphere is anticipated to drive the market growth. Moreover, the growing popularity of casino tourism as popular destinations are establishing themselves as global casino hubs, attracting tourists each year solely for gambling activities, is supporting the market growth. In line with this, the increasing influx of new and technologically advanced gaming equipment in hospitality spaces to keep up with consumer expectations and international standards is providing lucrative opportunities for the market growth.

Casino Gaming Equipment Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on product type, installation, mode of operation, and end user.

Breakup by Product Type:

Slot Machines

Video Lottery Terminal

Video Poker Machines

Others

Slot machines dominate the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes slot machines, video lottery terminal, video poker machines, and others. According to the report, slot machines represented the largest segment.

Slot machines are dominating the casino gaming equipment market due to their ease of

use and straightforward functionality, making them accessible even for novices. Moreover, they provide diverse themes, features, and payout structures, allowing casinos to target various customer segments effectively. Along with this, the integration of advanced technologies like touch-screen interfaces, high-definition (HD) displays, and immersive sound effects elevating the modern slot machine from a simple mechanical device to an engaging entertainment platform is catalyzing the market growth. Furthermore, slot machines are lucrative revenue generators compared to other casino games. Moreover, slot machines are also highly scalable as they can be installed in various settings beyond traditional casinos, such as airports, bars, and online platforms, further contributing to the market growth.

Breakup by Installation:

Installed Inside Casino

Installed Outside Casino

Installed inside casino dominate the market

The report has provided a detailed breakup and analysis of the market based on the installation. This includes installed inside casino and installed outside casino. According to the report, installed inside casino represented the largest segment.

Equipment installed inside the casino dominates the market owing to the mainstream appeal and legitimacy of physical casinos. They are often seen as entertainment complexes offering a variety of services, from gaming and dining to shows and shopping. Moreover, they are often subjected to stringent checks and balances, leading to a growing demand for high-quality, compliant casino gaming equipment, which is supporting the market growth. Besides this, traditional casinos are the most common venues for high-stakes gambling, attracting a segment of players who prefer the tactile experience of real tables and slot machines. Along with this, casinos invest heavily in creating a luxurious and immersive gaming experience, which extends to the equipment they use. Additionally, high-quality, aesthetically pleasing equipment enhances the customer experience, encouraging longer stays and repeat visits, thus propelling the market growth.

Breakup by Mode of Operation:

Floor Mounted

Portable

Floor mounted dominates the market

The report has provided a detailed breakup and analysis of the market based on the mode of operation. This includes floor mounted and portable. According to the report, floor mounted represented the largest segment.

Floor-mounted casino gaming equipment holds the dominant position in the market owing to its efficient space utilization, as casinos have intricately planned layouts designed to maximize player engagement and circulation. Moreover, floor-mounted units are generally more stable and durable than portable or wall-mounted installations. It is particularly important in a high-traffic environment like a casino, where equipment needs to withstand constant use and occasional rough handling. Additionally, these units can be easily integrated with the casino's overall technology ecosystem, featuring built-in electronic payments, player tracking, and game analytics. Furthermore, they offer a more comfortable and accessible gaming experience as they are installed at an ideal height and orientation, allowing players to interact with the game effortlessly.

Breakup by End User:

Casinos

Malls

Leisure Centers

Others

Casinos dominate the market

The report has provided a detailed breakup and analysis of the market based on the end user. This includes casinos, malls, leisure centers, and others. According to the report, casinos represented the largest segment.

Casinos are dominating the market share as gaming is the core business in these attractions, leading to increasing investment in gaming equipment to ensure a high-quality experience for their customers. Moreover, casinos rely heavily on the income generated from gaming activities, which creates an inherent need for the best and most effective gaming equipment, thus supporting the market growth. Besides this, they are often subject to rigorous regulatory requirements, which extend to the gaming units they use, leading to the utilization of equipment that meets certain technical specifications. Along with this, casinos are committed to offering an exceptional gaming experience to

attract and retain customers, involving investment in premium gaming equipment featuring the latest technological advancements. Furthermore, casinos are at the forefront of adopting new gaming technologies, from digital interfaces and touchscreens to smart chips and electronic card shufflers.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest casino gaming equipment market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report,

North America accounted for the largest market share.

North America exhibits a clear dominance in the global casino gaming equipment market as the region has a strong economy supporting high consumer spending levels on entertainment and leisure activities, including casino gaming. Moreover, the regulatory environment in the region is relatively stable and well-defined, making it easier for casino operators to comply with rules and standards. This robust regulatory framework provides market stability and instills confidence in operators and equipment manufacturers, enabling a more straightforward process for introducing new gaming equipment and fostering innovation. Besides this, casino gaming is a part of the regional culture, which is further driving the demand for various gaming equipment. Additionally, the cultural affinity for gaming also opens doors for technological innovations and new game formats, keeping the market dynamic and receptive to new types of equipment.

Competitive Landscape:

The leading companies in the casino gaming equipment market continually focus on research and development (R&D) to bring new and innovative products, including gaming equipment with enhanced digital interfaces, more secure payment systems, and features that improve user experience. Along with this, companies are engaging in mergers and acquisitions to augment their market share and diversify their product offerings. Besides this, many companies are adding various types of gaming equipment to their product portfolio that involves entering new categories like electronic table games or expanding their range of slot machines to include different themes and features. Moreover, several key players are also focusing on incorporating the latest technologies into their products, including touchscreen interfaces, digital payment options, and virtual reality (VR) elements, to improve customer engagement and ensure compliance with evolving regulatory standards.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Abbiati Casino Equipment S.r.l.

AGS LLC

Aristocrat Leisure Limited

Cammegh

Euro Games Technology OOD

Everi Holdings Inc.

Incredible Technologies Inc.

International Game Technology PLC
Jackpot Digital Inc.
Konami Holdings Corporation
Novomatic
Scientific Games Corporation
TCS John Huxley Ltd. (Victoria Holdings Ltd.)

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Recent Developments:

In September 2023, Scientific Games Corporation announced the launch of a customer relationship management (CRM) solution focused on driving player engagement and retention for traditional retail and digital lottery programs, including second-chance, loyalty and iLottery.

In July 2023, Aristocrat Limited released the first visuals of the new NFL-themed slot machines with the reveal of NFL Super Bowl Jackpots. The game will bring the largest sports brand in the U.S. to casino floors across the country at the start of the 2023 NFL season.

In August 2023, International Game Technology PLC (IGT) announced that its subsidiary, IGT Global Solutions Corporation, signed a contract with EULOTO UAB (Euloto). IGT will integrate its RGS platform with Euloto's iLottery system, enabling Euloto to have access to a wide variety of instant content.

Key Questions Answered in This Report

1. What was the size of the global casino gaming equipment market in 2023?
2. What is the expected growth rate of the global casino gaming equipment market during 2024-2032?
3. What are the key factors driving the global casino gaming equipment market?
4. What has been the impact of COVID-19 on the global casino gaming equipment market?
5. What is the breakup of the global casino gaming equipment market based on the product type?
6. What is the breakup of the global casino gaming equipment market based on the installation?
7. What is the breakup of the global casino gaming equipment market based on the mode of operation?
8. What are the key regions in the global casino gaming equipment market?

9. Who are the key players/companies in the global casino gaming equipment market?

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