

JULY 2025

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# Sweepstakes Casino Players

MOTIVATIONS AND PERCEPTIONS

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• • • • •

•  AMERICAN  
GAMING  
ASSOCIATION®

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# Consumers: Sweepstakes Casinos are a Substitute for iGaming

01

Players across both formats are primarily motivated by the opportunity to win real money; strongly contrasting with free-to-play game players.

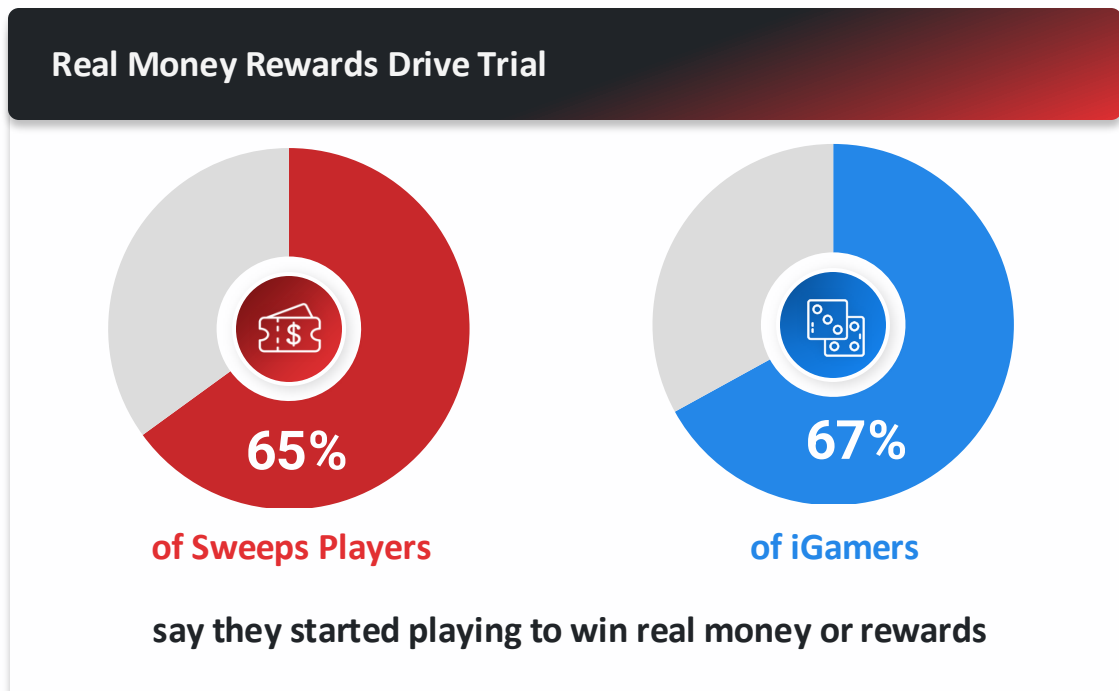
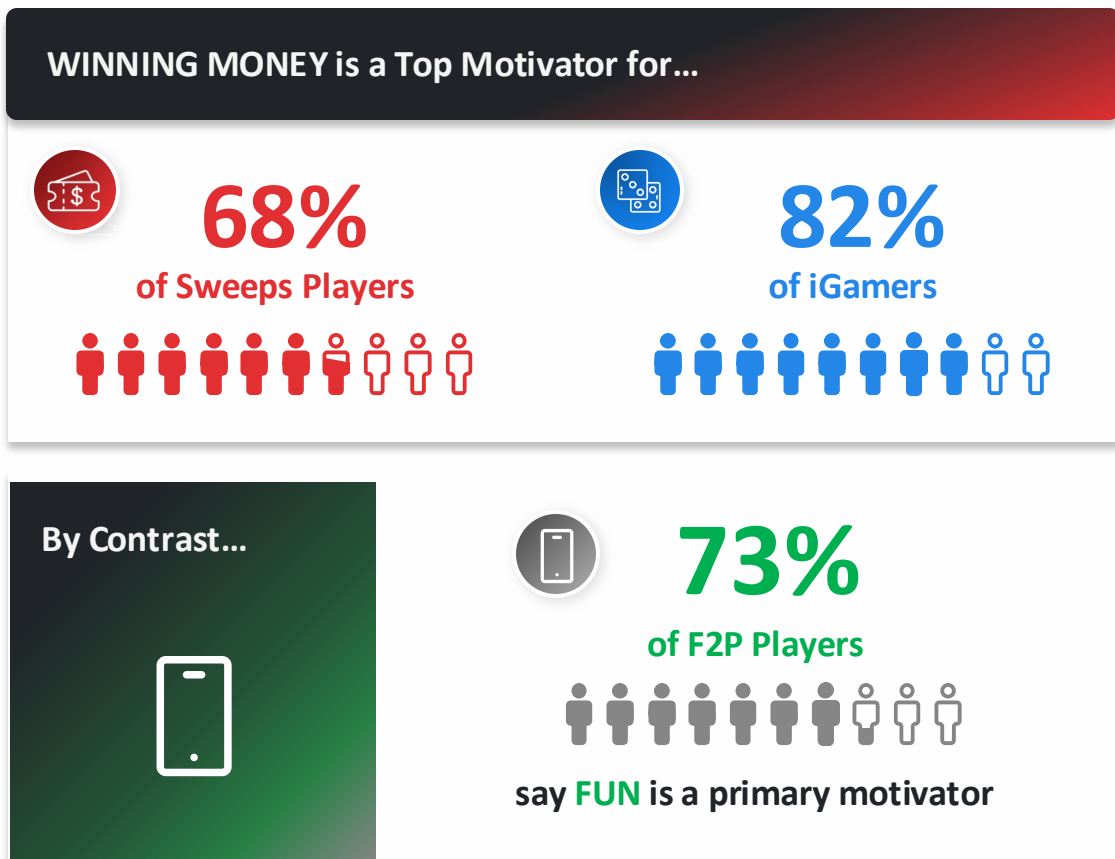
02

Most sweeps players perceive sweeps casinos as real-money gambling platforms.


03

Regulatory action alters player behavior: In states where less than half of sweeps operators are live, fewer players use sweeps sites.

# ::: Sweep Players Motivated by Money; Contrasts to F2P Consumers

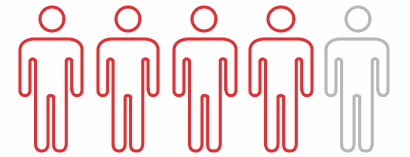


R2/R2a/R2b. What are the top 3 reasons why you PLAY casino games such as slots and table games in sweepstakes casinos?  
F7/F7a. Thinking about your favorite sweepstakes casino, what captured your attention and convinced you to give it a try?

A photograph of two women in a casino setting. They are standing at a slot machine, looking at the screen with interest. The woman on the left is wearing a light blue button-down shirt and has her hair pulled back. The woman on the right is wearing a dark jacket over a light-colored top. The background is slightly blurred, showing other casino lights and machines.

Four-in-five sweeps  
players spend at least  
monthly on the sites

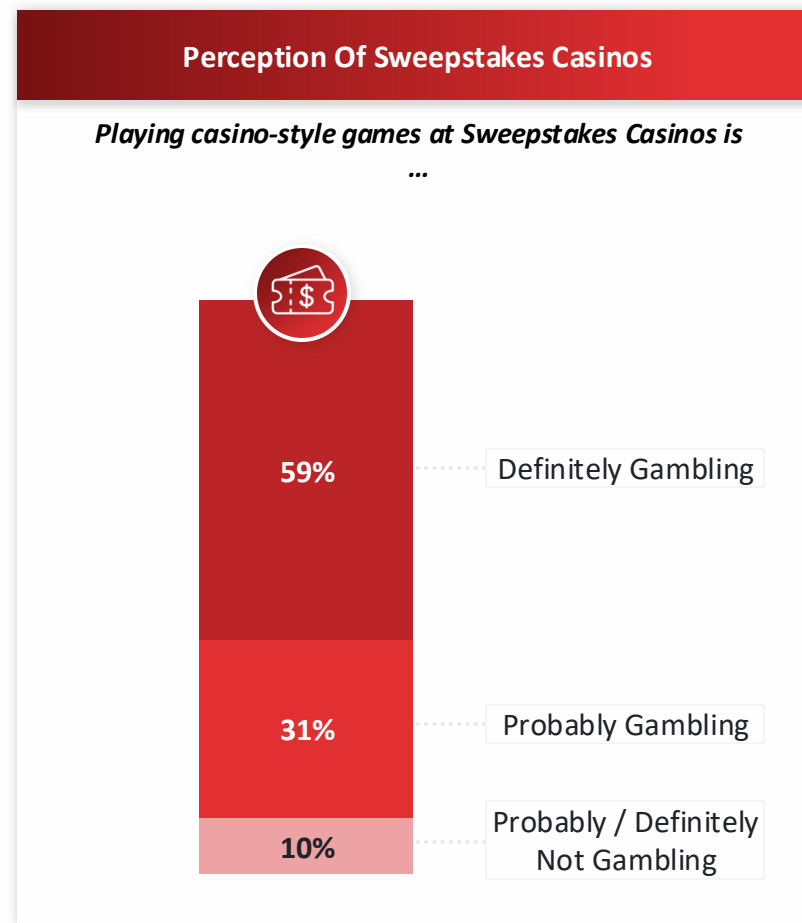
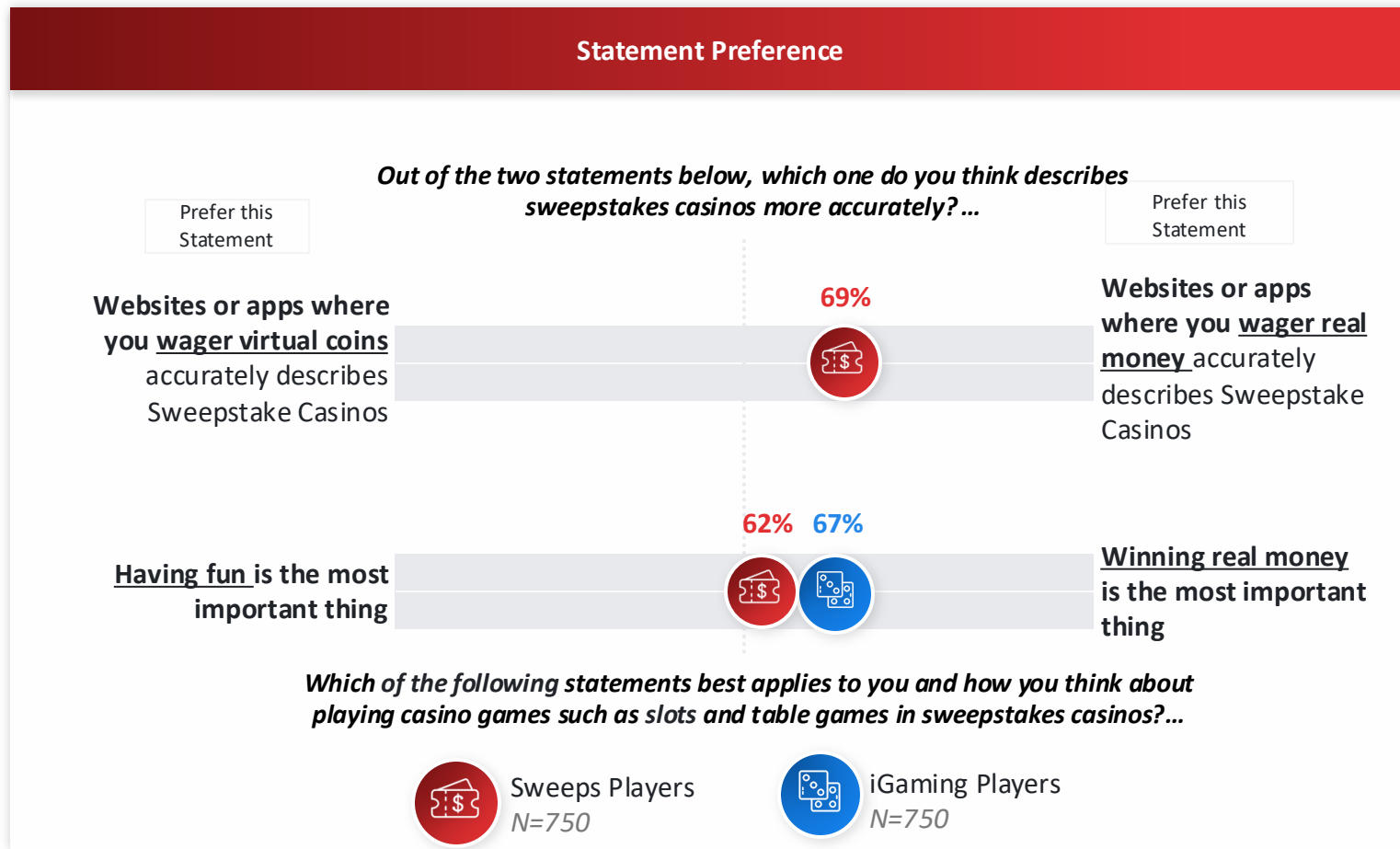
80 percent



Compared to just half of  
pure free-to-play players



# ::: Sweeps Players Overwhelmingly Believe that Sweepstakes Casinos are Real Money Gambling

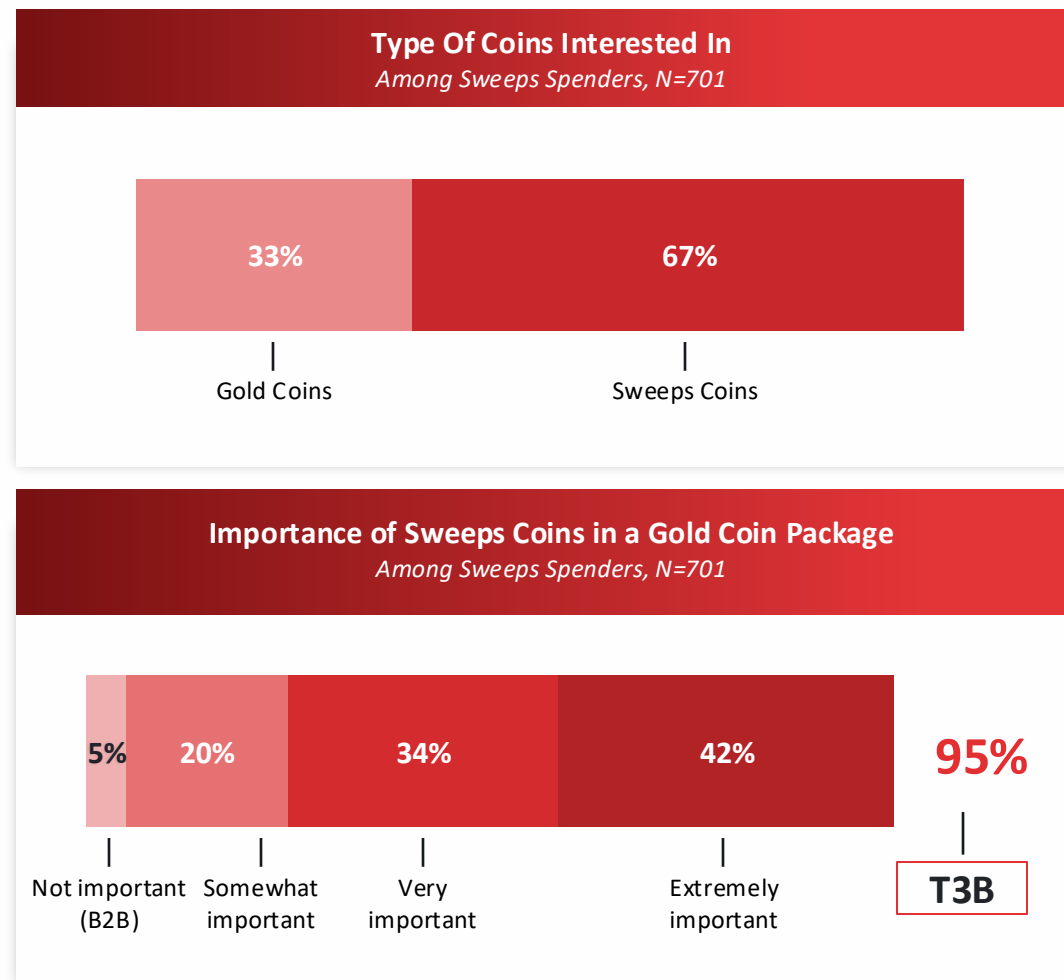


R7/R7a. Which of the following statements best applies to you and how you think about playing casino games such as slots and table games in sweepstakes casinos?

R8. Out of the two statements below, which one do you think describes sweepstakes casinos more accurately?

F9. Please choose the statement below that best matches your perspective on sweepstakes casinos. Playing casino-style games at sweepstakes casinos is ...

# Sweepstakes Casino Spend is Driven by Real Value “Sweeps Coins,” Not Free-to- Play “Gold Coins”



F2. When you spend real money in sweepstakes casinos, which type of coins are you primarily interested in?

F3. You mentioned spending money in sweepstakes casinos. How important are the included Sweeps Coins when deciding to purchase a Gold Coin package?

# Regulatory Action Impacts Player Decisions



53%

**Fewer sweeps players in states\*  
that have taken action to limit  
market access**

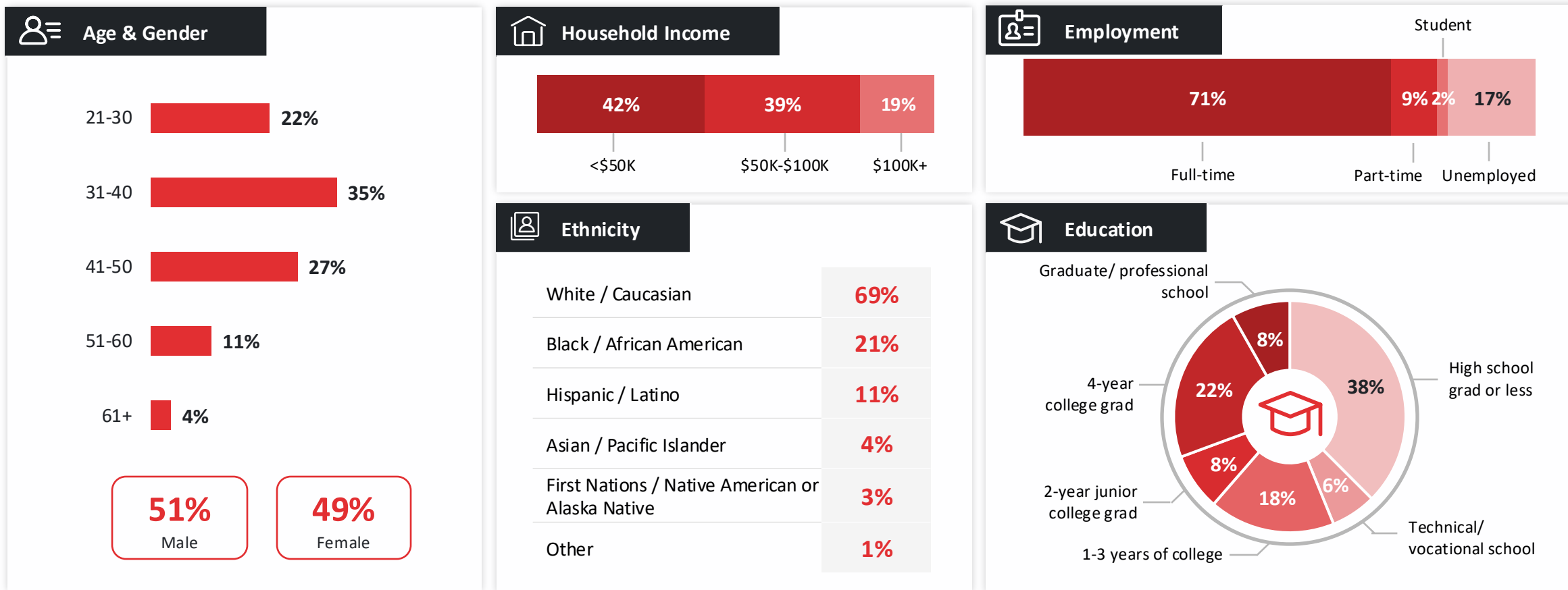


# Demographics of Sweepstakes Casino Players and iGamers are Identical



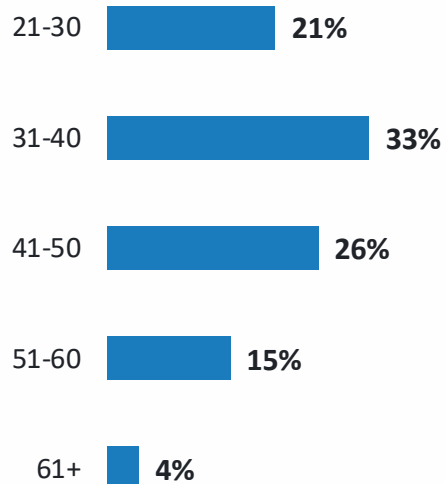


# ::: Sweepstakes Casinos: Player Demographics



# ::: iGamers: Player Demographics

## Age & Gender



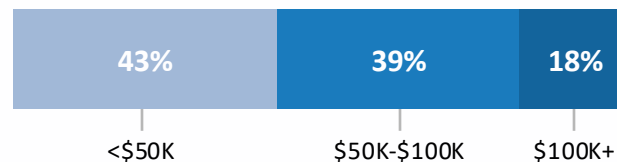
54%

Male

46%

Female

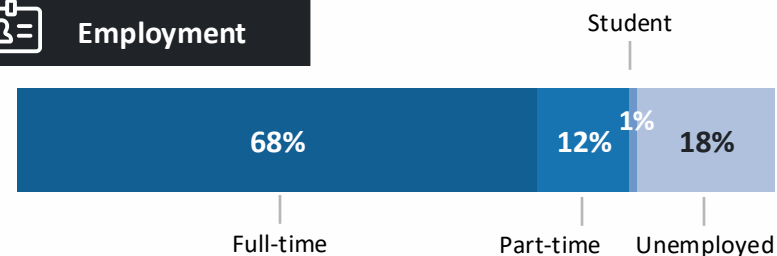
## Household Income



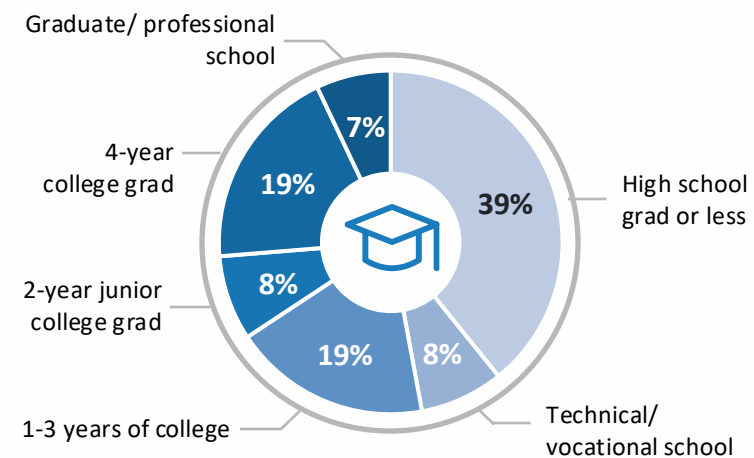
## Ethnicity

White / Caucasian	73%
Black / African American	20%
Hispanic / Latino	8%
Asian / Pacific Islander	2%
First Nations / Native American or Alaska Native	2%
Other	1%

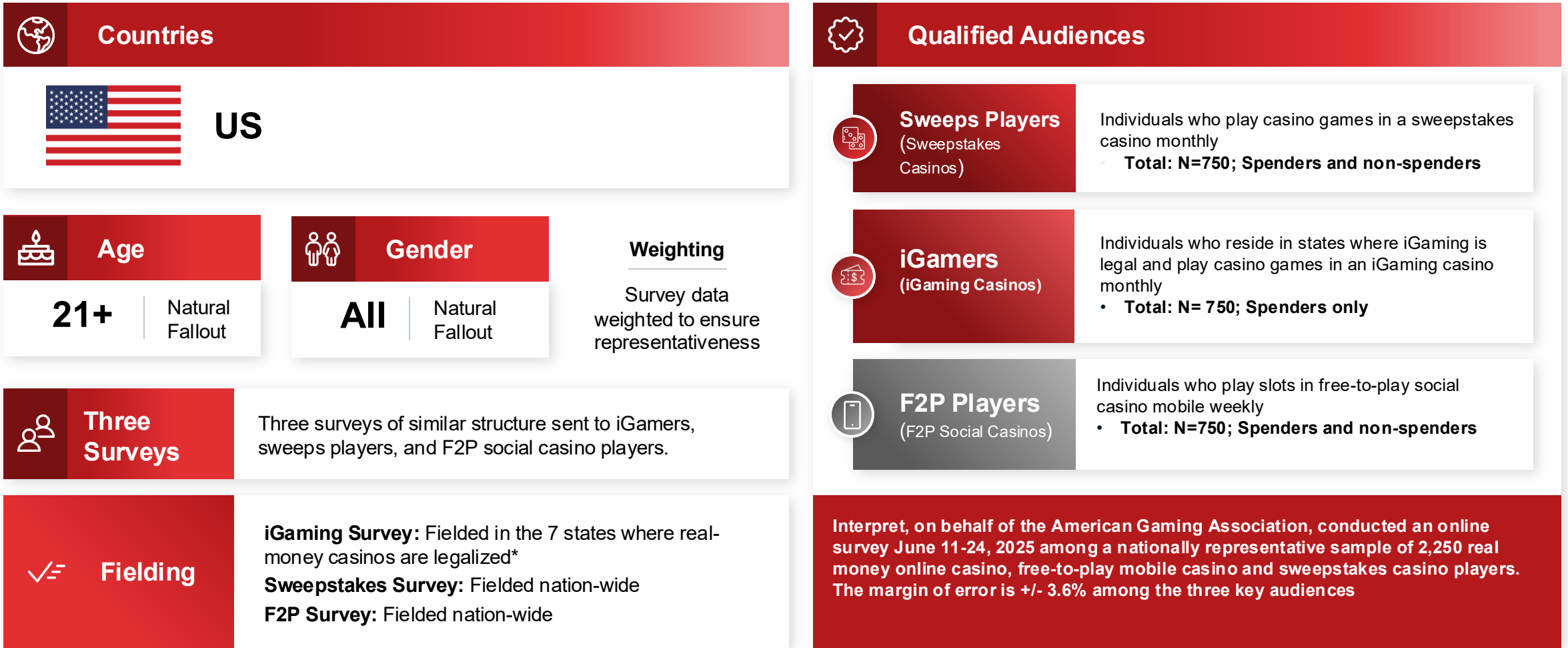
## Employment



## Education



# ::: Survey Methodology



# Contact

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