

Casino Management Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Casino Management Systems Market Analysis

The casino management system market is valued at USD 7.57 billion in 2024 and is forecast to reach USD 16.94 billion by 2030, advancing at a 14.49% CAGR from 2025 to 2030. Demand accelerates as operators move from transactional oversight toward data-driven decision making, predictive analytics, and cashless operations. Asia-Pacific integrated-resort expansion, expanding U.S. sports wagering, and stricter anti-money-laundering rules are key growth catalysts, while persistent labor shortages and cyber-breach risks temper momentum. Cloud deployment is transforming cost structures for tribal and small properties, allowing them to access enterprise-grade capabilities without high capital outlays. Meanwhile, analytics-centric modules are reshaping competitive positioning as vendors race to embed artificial intelligence into player tracking, security, and marketing workflows.

Global Casino Management Systems Market Trends and Insights

Rapid Integrated-Resort Builds Across Asia

Asia's pipeline of integrated resorts is accelerating demand for end-to-end casino management systems as new properties aim to unify gaming, hospitality, and retail operations under a single data layer. July 2024 saw Galaxy Entertainment deploy smart tables that stream real-time wagering data to analytics engines, showcasing the scale of data that new venues must manage. Melco Resorts has paired similar technology with sustainability dashboards that tie energy use to guest behaviour, highlighting how modern platforms now balance revenue optimisation with environmental targets. Multi-property operators also seek

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

cross-jurisdiction compliance tools as expansions reach the Philippines, Japan, and the United Arab Emirates. These requirements are propelling higher-value contracts that bundle accounting, player-tracking, hotel, and retail modules. Vendors able to pre-integrate regional compliance libraries are gaining early-mover advantage, positioning the casino management system market for sustained double-digit growth in the region.

Mandatory Cashless / TITO Regulations

Australia's 2024 reforms mandate carded play and sub-AUD 1,000 cash limits, forcing every property in Queensland to upgrade payment, tracking, and AML capabilities. Nevada's gradual push toward cashless floors mirrors this trajectory, converging regulatory and consumer pressure. Vendors such as Everi and Crane Payment Innovations respond with wallet integrations that retrofit into existing infrastructures, allowing gradual adoption without full rip-and-replace projects. Compliance deadlines compress decision windows, driving near-term spending spikes within the casino management system market. Long-term, card-based transaction histories supply richer datasets for loyalty and responsible-gaming algorithms, reinforcing the strategic pivot toward analytics.

High-Profile Cyber-breaches

The 2024 attacks on MGM Resorts and Caesars exposed millions of patron records, prompting industry-wide reassessment of security protocols. Rising ransomware premiums and liability risks delay procurement decisions as boards demand higher penetration-test thresholds. Vendors now integrate facial recognition and behavioural analytics to identify fraud in real time, but tighter access control policies can complicate user workflows. The overall effect is longer sales cycles and incremental security spend that can crowd out broader CMS upgrades, applying downward pressure on near-term growth.

Other drivers and restraints analyzed in the detailed report include:

U.S. Sports-Betting Legalisation / Cloud-based CMS Adoption by Tribal Casinos / Macau Concession CapEx Freeze /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Software accounted for 70% of the casino management system market in 2024, reflecting its role in accounting, player tracking, and regulatory compliance. Large operators favour feature-rich suites such as IGT ADVANTAGE that bundle core cage, slot, and marketing modules. Regulatory audits in the United States and Australia require daily accounting exports, reinforcing software's criticality. However, services revenue is rising faster, growing at an 18.7% CAGR as properties seek custom integrations, analytics tuning, and 24x7 managed support. System complexity has increased with the addition of facial recognition, cashless wallets, and sports-book data feeds, boosting demand for professional services. The casino management system market size linked to services is projected to expand from USD 2.27 billion in 2024 to USD 6.36 billion in 2030.

Consulting firms embedded within vendor ecosystems now guide properties through staged deployments that minimise downtime. A notable example is the joint implementation by eConnect and Table Trac at a Native American casino in Texas, where integration services united facial recognition with real-time pit data. As CMS platforms evolve into strategic intelligence hubs rather than back-office utilities, recurring service contracts give vendors stable annuity streams, intensifying competition for certified implementation partners.

On-premise systems commanded an 82% share in 2024 because many regulators still require local storage of wagering data and continuous availability during network outages. High-availability clusters and dedicated fiber links help mitigate downtime risk, yet

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

capital and staffing costs remain high. Cloud deployments, while only 18% today, are scaling at 22.4% CAGR as vendors strengthen encryption, offer region-specific data centres, and secure regulatory approvals. The casino management system market size attached to cloud installations is expected to reach USD 4.88 billion by 2030.

Tribal and small commercial properties drive momentum because they gain enterprise-grade functionality without building costly server rooms. IGT pitches a 30% total cost of ownership reduction over five years for its supplemental cloud layer, citing elastic processing that lowers energy costs during off-peak periods. Regulators in New Jersey and Queensland have issued guidance that recognises cloud as an acceptable option when transactional logs remain immutable. As security certifications proliferate, mid-tier regional operators are beginning phased migrations, signalling a tipping point in the deployment mix across the casino management system market.

Casino Management Systems Market Segmented by Component (Software, Services), Deployment Mode (On-Premise, Cloud-Based), Purpose (Accounting and Cage Operations, Security and Surveillance, Hotel and Resort Management, Analytics and Reporting, and More), End-User (Small and Medium Casinos, Large Casinos), Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America generated 38% of the casino management system market revenue in 2024. The United States drives spend with expanding sports betting, while Canada's Ontario market adds incremental demand. Tribal casinos deploy cloud platforms to mitigate IT gaps and integrate facial recognition for security, exemplified by the Texas installation linking CasinoTrac data with eConnect biometrics. Compliance calendars remain active; January 2025 imposes 23 new mandates across Illinois, Tennessee, and New Jersey, pushing operators to upgrade reporting and self-exclusion interfaces. Accelerated cloud adoption and cross-channel loyalty upgrades keep regional growth above the global average.

Asia-Pacific is the fastest-growing territory, posting an 18.1% CAGR. Smart tables in Macau and the Philippines capture granular wagering data, while Australia's identity-verification rules accelerate cashless adoption. Japan's first integrated resort and India's potential regulatory reforms could unlock significant latent demand later in the decade. Despite capital constraints in Macau, properties elsewhere in the region are building greenfield resorts with AI-ready infrastructure, helping the casino management system market size in Asia-Pacific surpass USD 4 billion by 2030.

Europe's market is shaped by stringent AML directives and responsible-gaming standards. The EU 6th directive has triggered upgrades to analytics modules capable of detecting beneficial-ownership risks. The UK introduced new technical standards that limit autoplay and speed up spin-rate disclosures, forcing content compliance updates. Latin America is an emerging hotspot; Brazil began regulated iGaming on January 1 2025 and is expected to drive vendor localisation efforts for Portuguese interfaces and local tax requirements. The Middle East and Africa remain nascent but are underpinned by tourism-led projects in the UAE and Saudi Arabia that could adopt resort-scale CMS suites once legislation permits.

List of Companies Covered in this Report:

International Game Technology PLC / Aristocrat Leisure Ltd. / Novomatic AG / Scientific Games Corp. (Light & Wonder) / Konami Gaming Inc. / Bally Technologies Inc. / Winsystems Inc. / TCS John Huxley / Agilysys Inc. / Oracle Hospitality / Everi Holdings Inc. / Table Trac Inc. / DOJY Group Ltd. / Amatic Industries GmbH / Bluberi Gaming Technologies Inc. / Apex Gaming Technology / Decart Ltd. / TransAct Technologies Inc. / Genesis Gaming Solutions Inc. / Syswin Solutions / CasinoTrac / Tangam Systems Inc. / Axes.ai / Advansys d.o.o. / BetConstruct / CT Gaming / QUONTRA Solutions /

Additional Benefits:

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

 The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Rapid Integrated-Resort Builds Across Asia Driving CMS Roll-outs
 - 4.2.2 Mandatory Cashless/TITO Regulations in Australia & Nevada
 - 4.2.3 U.S. Sports-Betting Legalisation Fuelling Loyalty-System Upgrades
 - 4.2.4 Cloud-based CMS Adoption by Tribal Casinos to Offset IT Shortfalls
 - 4.2.5 EU 6th AML Directive Accelerating Analytics-Module Demand
 - 4.2.6 Labour Shortage in Pit Operations Prompting Automation Modules
- 4.3 Market Restraints
 - 4.3.1 High-Profile Cyber-breaches Increasing Operator Liability
 - 4.3.2 Macau Concession CapEx Freeze Delaying New CMS Contracts
 - 4.3.3 Stricter GDPR-style Data-Privacy Rules Curb Player-Tracking Depth
 - 4.3.4 Land-based Footfall Erosion from Online & Mobile Gaming
- 4.4 Regulatory Outlook
- 4.5 Porter's Five Forces Analysis
 - 4.5.1 Bargaining Power of Suppliers
 - 4.5.2 Bargaining Power of Buyers
 - 4.5.3 Threat of New Entrants
 - 4.5.4 Threat of Substitutes
 - 4.5.5 Intensity of Competitive Rivalry
- 4.6 Investment Analysis

5 MARKET SIZE AND GROWTH FORECASTS (VALUES)

- 5.1 By Component
 - 5.1.1 Software
 - 5.1.2 Services
- 5.2 By Deployment Mode
 - 5.2.1 On-premise
 - 5.2.2 Cloud-based
- 5.3 By Purpose
 - 5.3.1 Accounting and Cage Operations
 - 5.3.2 Security and Surveillance
 - 5.3.3 Hotel and Resort Management

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.4 Analytics and Reporting
- 5.3.5 Player Tracking and Loyalty
- 5.3.6 Media Management and Digital Signage
- 5.3.7 Marketing and Promotions
- 5.4 By End Users
 - 5.4.1 Small and Medium Casinos
 - 5.4.2 Large Casinos
- 5.5 By Geography
 - 5.5.1 North America
 - 5.5.1.1 United States
 - 5.5.1.2 Canada
 - 5.5.2 South America
 - 5.5.2.1 Brazil
 - 5.5.2.2 Argentina
 - 5.5.2.3 Mexico
 - 5.5.2.4 Rest of South America
 - 5.5.3 Europe
 - 5.5.3.1 Germany
 - 5.5.3.2 United Kingdom
 - 5.5.3.3 France
 - 5.5.3.4 Italy
 - 5.5.3.5 Spain
 - 5.5.3.6 Rest of Europe
 - 5.5.4 Asia-Pacific
 - 5.5.4.1 China
 - 5.5.4.2 Japan
 - 5.5.4.3 South Korea
 - 5.5.4.4 India
 - 5.5.4.5 Australia
 - 5.5.4.6 New Zealand
 - 5.5.4.7 Rest of Asia-Pacific
 - 5.5.5 Middle East and Africa
 - 5.5.5.1 Middle East
 - 5.5.5.1.1 United Arab Emirates
 - 5.5.5.1.2 Saudi Arabia
 - 5.5.5.1.3 Turkey
 - 5.5.5.1.4 Rest of Middle East
 - 5.5.5.2 Africa
 - 5.5.5.2.1 South Africa
 - 5.5.5.2.2 Nigeria
 - 5.5.5.2.3 Kenya
 - 5.5.5.2.4 Rest of Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Strategic Developments
- 6.2 Vendor Positioning Analysis
- 6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Information, Products & Services, and Recent Developments)

6.3.1 International Game Technology PLC

6.3.2 Aristocrat Leisure Ltd.

6.3.3 Novomatic AG

6.3.4 Scientific Games Corp. (Light & Wonder)

6.3.5 Konami Gaming Inc.

6.3.6 Bally Technologies Inc.

6.3.7 Winsystems Inc.

6.3.8 TCS John Huxley

6.3.9 Agilysys Inc.

6.3.10 Oracle Hospitality

6.3.11 Everi Holdings Inc.

6.3.12 Table Trac Inc.

6.3.13 DJOY Group Ltd.

6.3.14 Amatic Industries GmbH

6.3.15 Bluberi Gaming Technologies Inc.

6.3.16 Apex Gaming Technology

6.3.17 Decart Ltd.

6.3.18 TransAct Technologies Inc.

6.3.19 Genesis Gaming Solutions Inc.

6.3.20 Syswin Solutions

6.3.21 CasinoTrac

6.3.22 Tangam Systems Inc.

6.3.23 Axes.ai

6.3.24 Advansys d.o.o.

6.3.25 BetConstruct

6.3.26 CT Gaming

6.3.27 QUONTRA Solutions

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-Need Assessment

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Casino Management Systems - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-27"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

