

**Bespoke Intel**

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# **DKNG Consumer Survey**

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**June 22, 2021**

We surveyed 2,500 US consumers who live in states in which DraftKings Sportsbook is legal and available, with 850 being sports gamblers (self-report gambling on sports more often than never).

## Key Takeaways:

### ***Competitive Dynamics and Loyalty – Positive Feedback For DraftKings In States Where It Is Available***

- DraftKings is the app sports gamblers are most likely to use (focusing on states in which DraftKings is available). DraftKings customers are most likely to also use FanDuel Sportsbook and BetMGM.
- In states in which DraftKings Sportsbook is available, DraftKings users are the most loyal (allocating 60% of their gambling bets / usage to the platform).

### ***Whale Dynamic – DraftKings Users Gamble More Per Year Than The Broader Sports Gambling Audience***

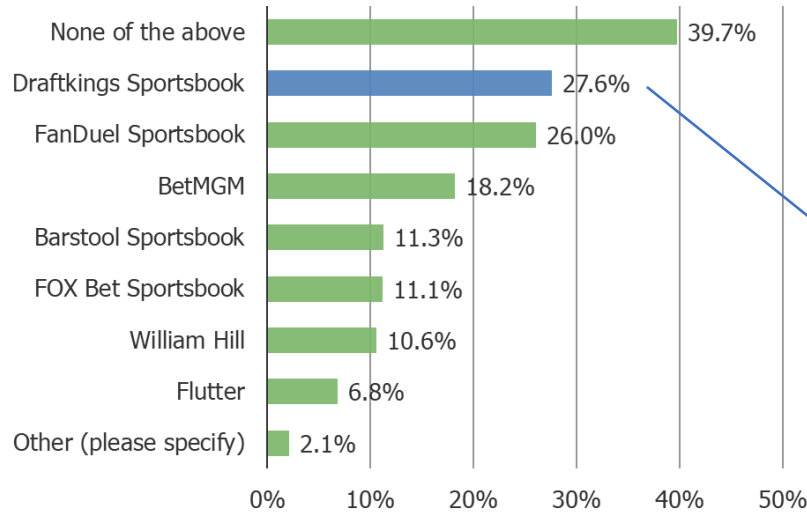
- Relative to the broader population of sports gamblers nationwide, DraftKings SportsBook users self-report gambling more money on sports per year.

### ***Engagement Dynamics – Post Legalization Changes, Promotions, Following Odds/Pricing***

- DraftKings Sportsbook users are more likely to have started gambling after gambling became legal in their state relative to the broader, nationwide, sports gambling audience.
- Among those who started gambling BEFORE it became legal in their state (in which DraftKings Sportsbook is available), those who use DraftKings Sportsbook are more likely to have reported an increase in how much they gamble relative to the broader sports gambling audience.
- Relative to the broader sports gambling audience, DraftKings Sportsbook users call out promotions as being more important when it comes to choosing which app to play on and how many bets to place.
- Relative to the broader sports gambling audience, DraftKings Sportsbook users watch odds/pricing on sports betting apps more often.

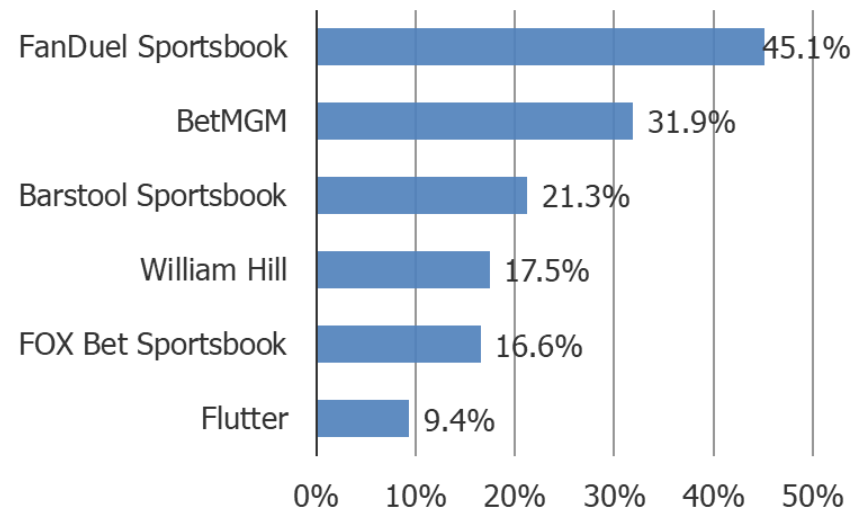
### Do you use any of the following sites/apps for sports gambling? (Select ALL that apply)

Posed to all respondents who gamble on sports at least rarely AND live in states where DraftKings Sportsbook is available.



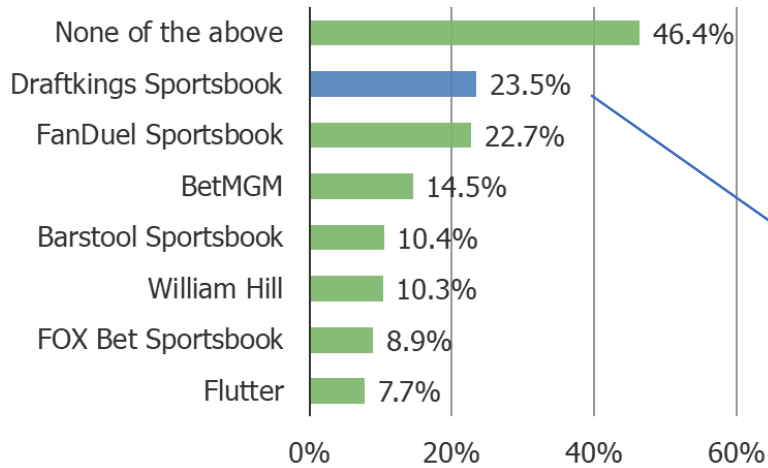
Which other platforms do DraftKings Sportsbook users ALSO say they use regularly or occasionally for sports gambling?

N=853

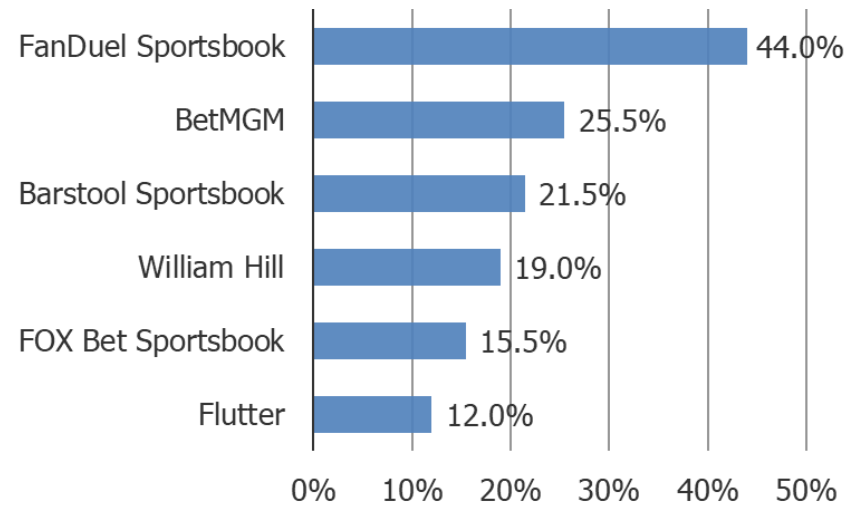


### Do you have any of the following apps downloaded on your phone? (Select ALL that apply)

Posed to all respondents who gamble on sports at least rarely AND live in states where DraftKings Sportsbook is available.



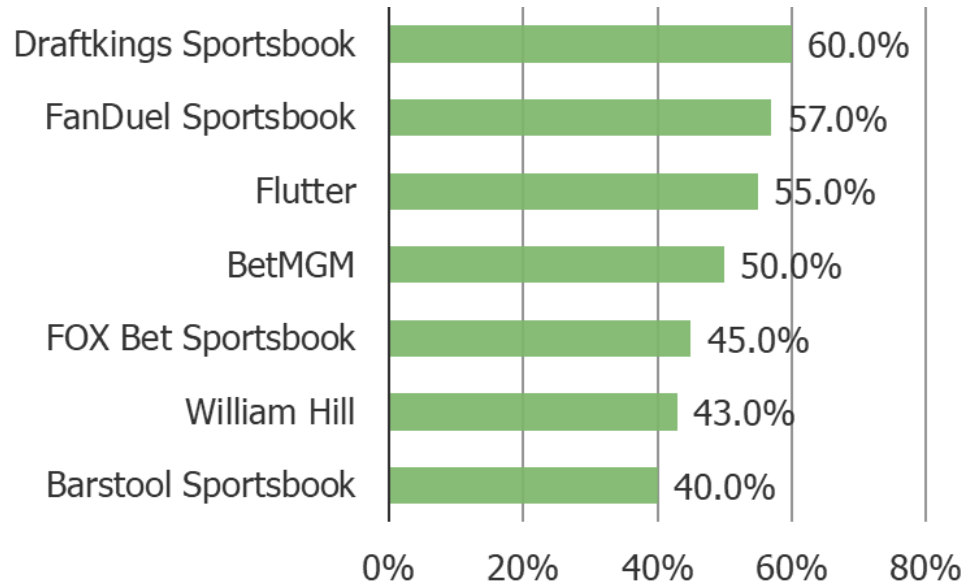
Which other apps do those who have DraftKings Sportsbook on their phone also have downloaded?



### What percentage of your sports gambling bets / usage goes to each of the following? Fill-In

Posed to all respondents who gamble on sports at least rarely AND live in states where DraftKings Sportsbook is available.

Note: Options were piped in that respondents said they use to gamble on sports regularly or occasionally. Among the options shown, the fill-ins were required to add up to 100% for each individual respondent.

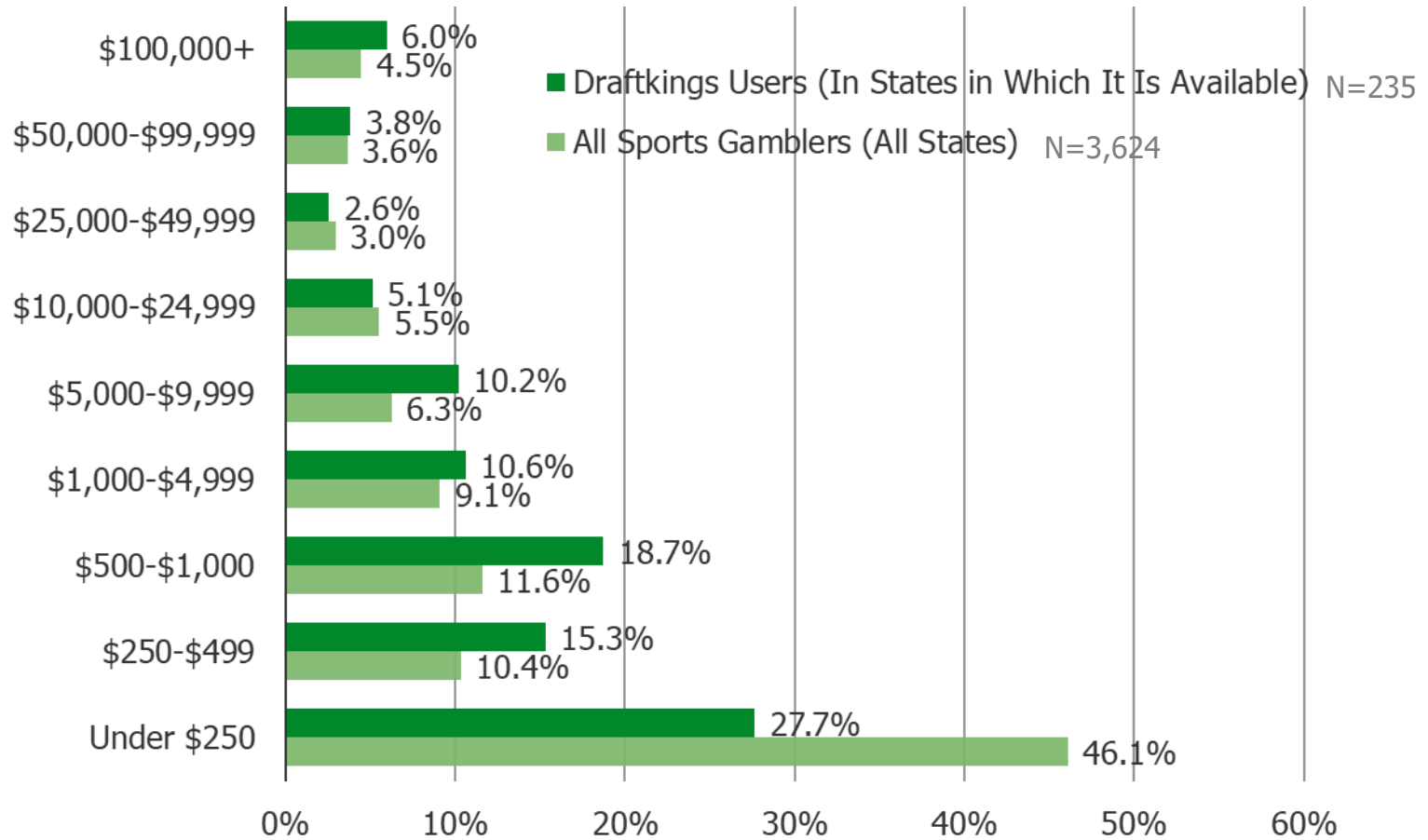


IE – DraftKings users, on average, filled in that 60% of their sports gambling bets/usage flows through DraftKings (the highest of all platforms, indicating the highest degree of loyalty).

	N =
Draftkings Sportsbook	235
FanDuel Sportsbook	222
Flutter	58
BetMGM	155
William Hill	90
Barstool Sportsbook	96
FOX Bet Sportsbook	95

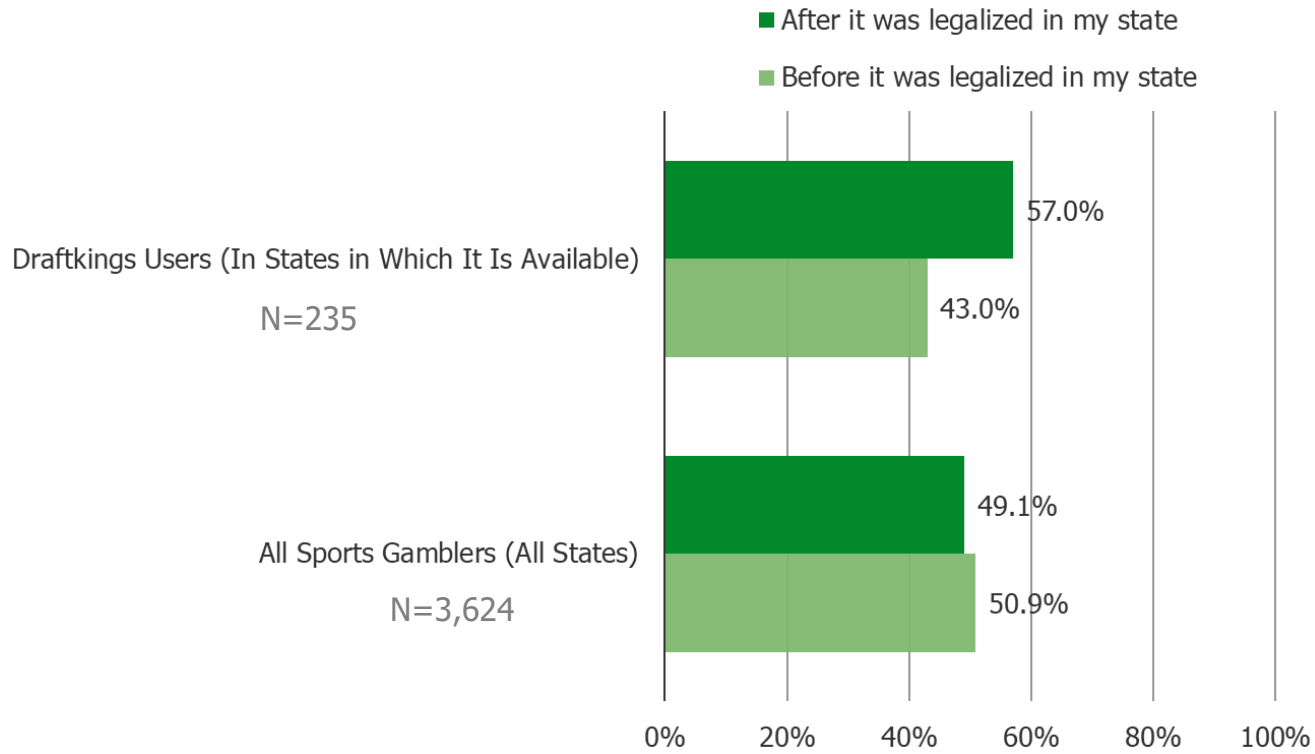
### Around how much money do you gamble on sports PER YEAR?

Posed to all respondents who gamble on sports at least rarely (cross-tabs noted below within the chart).



### When did you first start gambling on sports?

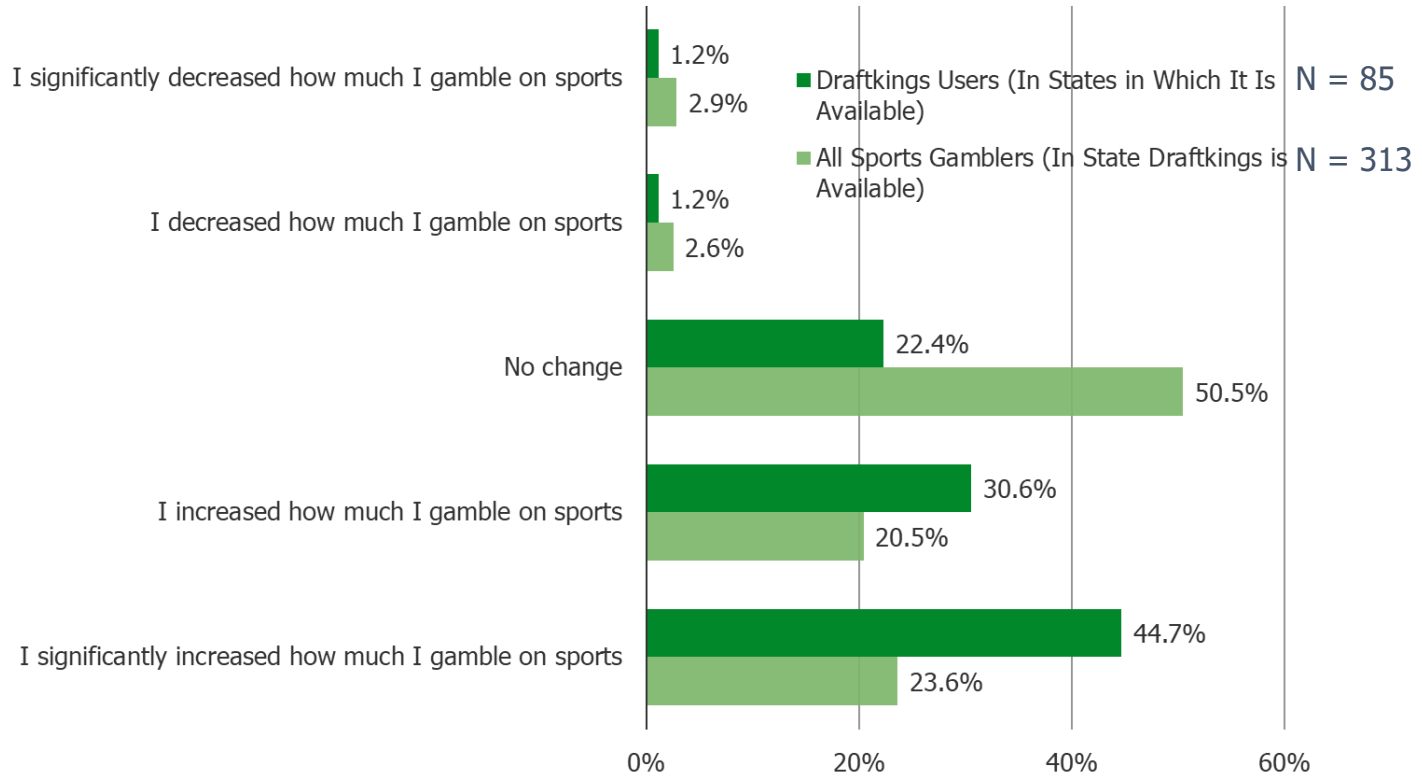
Posed to all respondents who gamble on sports at least rarely (cross-tabs noted below within the chart).



N=3663

### Did you change how much you gamble on sports AFTER sports gambling became legal in your state?

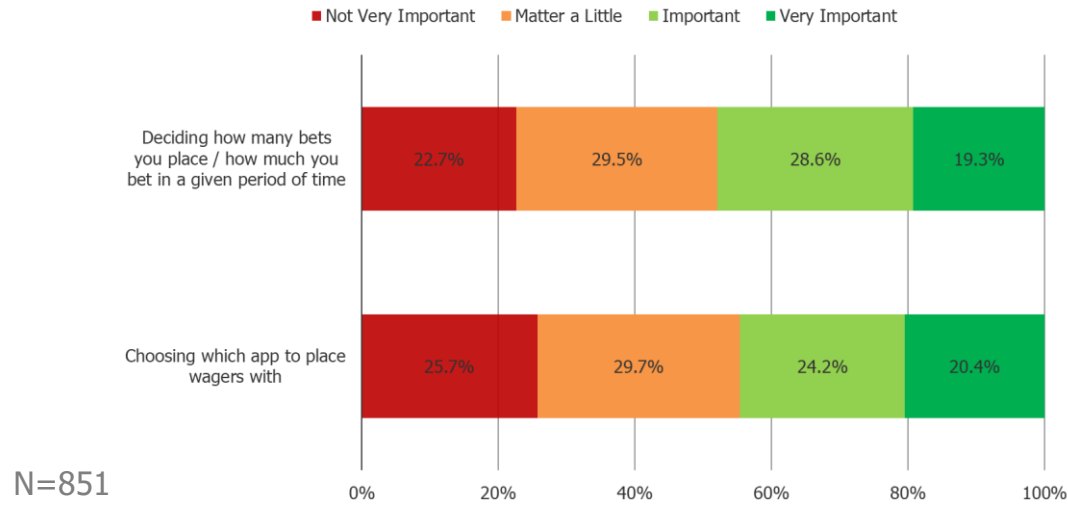
Posed to all respondents who said they originally started gambling BEFORE it became legal in their state (cross-tabs noted within the chart).



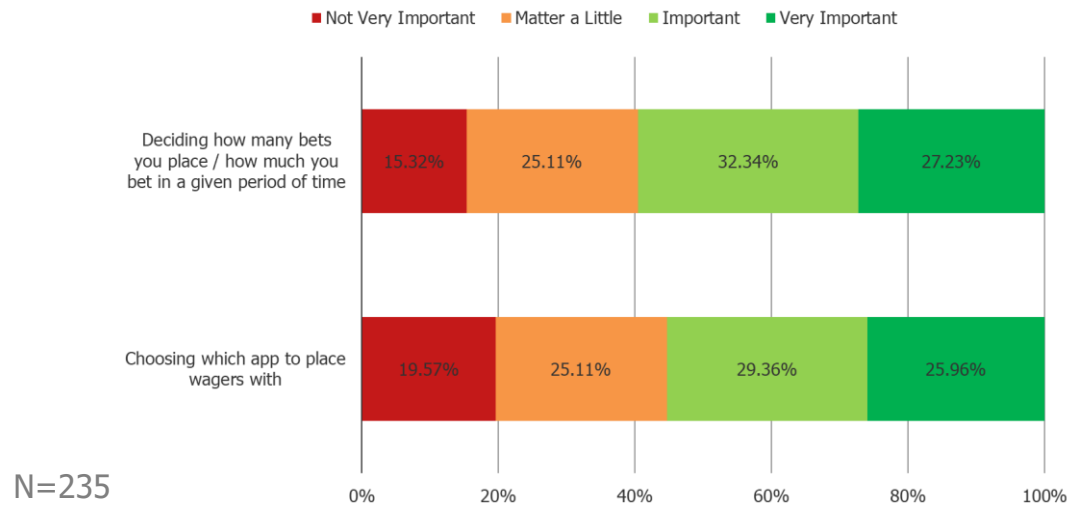


## How important are promotions available when it comes to...

Posed to all respondents who gamble on sports at least rarely AND live in states where DraftKings Sportsbook is available.

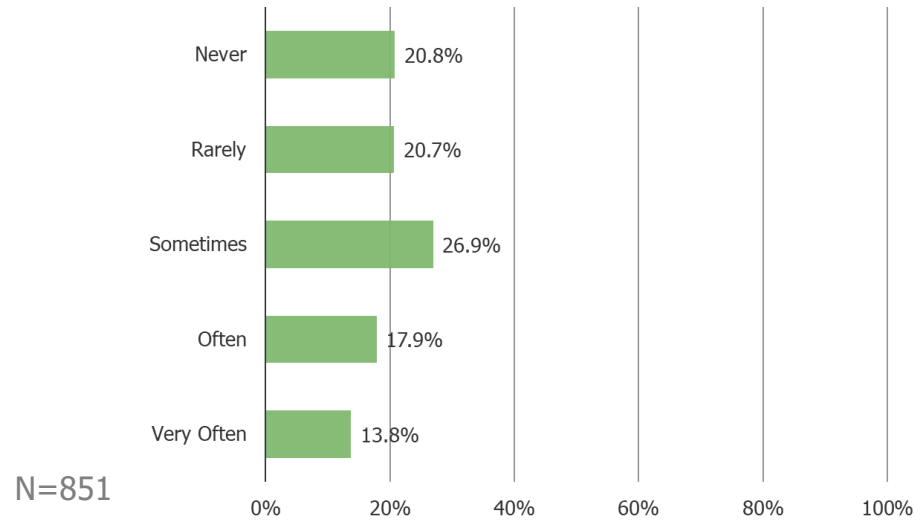


Posed to DraftKings users who live in states where DraftKings Sportsbook is available.



### How often do you watch odds/pricing on sports betting apps?

Posed to all respondents who gamble on sports at least rarely AND live in states where DraftKings Sportsbook is available.



Posed to DraftKings users who live in states where DraftKings Sportsbook is available.

