

Bespoke Intel

DKNG Consumer Survey

June 2, 2021

BACKGROUND:

- ❑ Survey of 1,100 US Consumers balanced to census.

FINDINGS:

- ❑ Over time, the % of consumers who self-report that they gamble on sports has increased.
- ❑ In states in which Draftkings is available & legal, 41.6% of sports gamblers said they started gambling on sports after it was legalized in their state.
- ❑ In states in which Draftkings sports gambling is legal and available, Draftkings is the number 1 choice for gambling on sports (27.0%), followed by “other methods not available on apps” (24.7%).
- ❑ Consumers who live in states in which Draftkings is currently not available or sports gambling is not legal watch sports more often than consumers who live in states in which Draftkings sports gambling is legal & available.
 - ❑ The same is true of sports gambling – respondents who live in states in which sports gambling is not legal or Draftkings is not available gamble on sports slightly more often than those who live in states in which Draftkings sports betting is legal & available.
- ❑ Among those who do not currently gamble on sports, the majority said they are unlikely to do it in the future.
- ❑ Respondents who gamble on sports are more likely to be younger, to be male, to have higher incomes, and to be from urban areas relative to those who gamble on sports rarely or never.



Sports Gambling

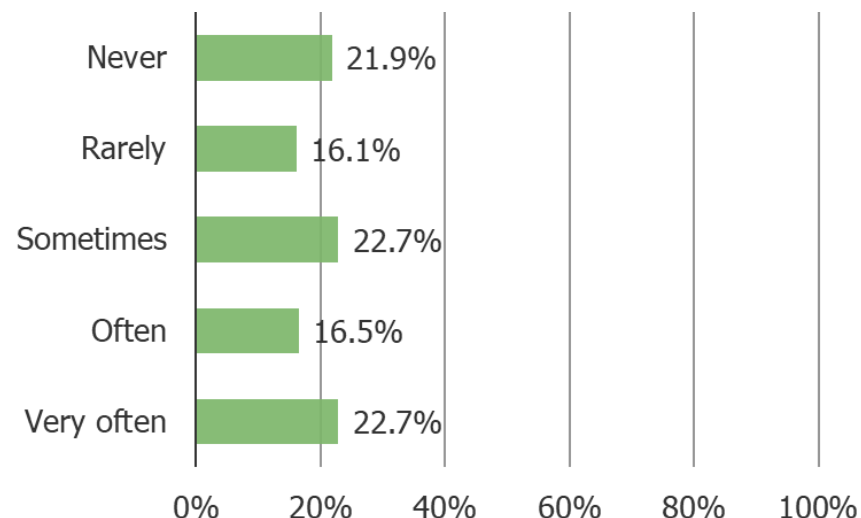
Demographics

Monthly Tracker Data

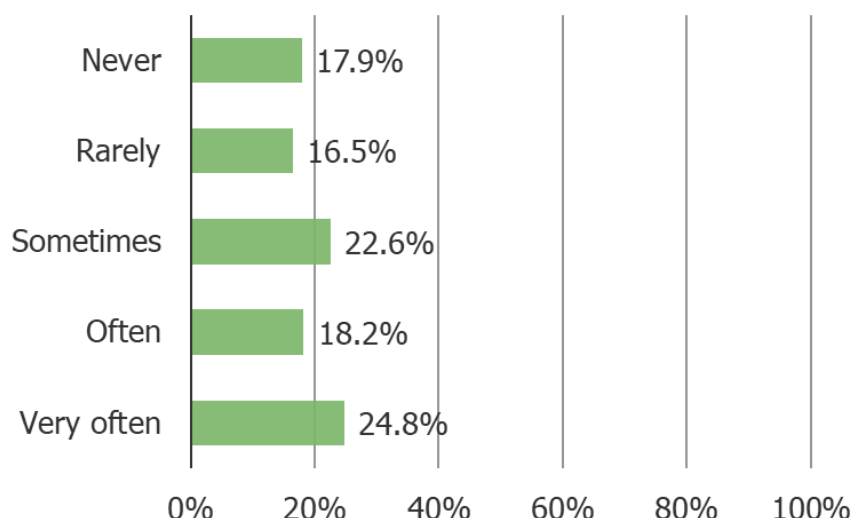
How often do you watch sports?

Posed to all respondents.

DraftKings Legal/Available (N = 242)



DraftKings Not Legal/Available (N = 899)



Cross-Tabs Above: Respondents from states where DraftKings sports gambling is available vs. not legal/not available.

Colorado, Illinois, Indiana, Iowa, Michigan, New Hampshire, New Jersey, Pennsylvania, Tennessee, Virginia, West Virginia.

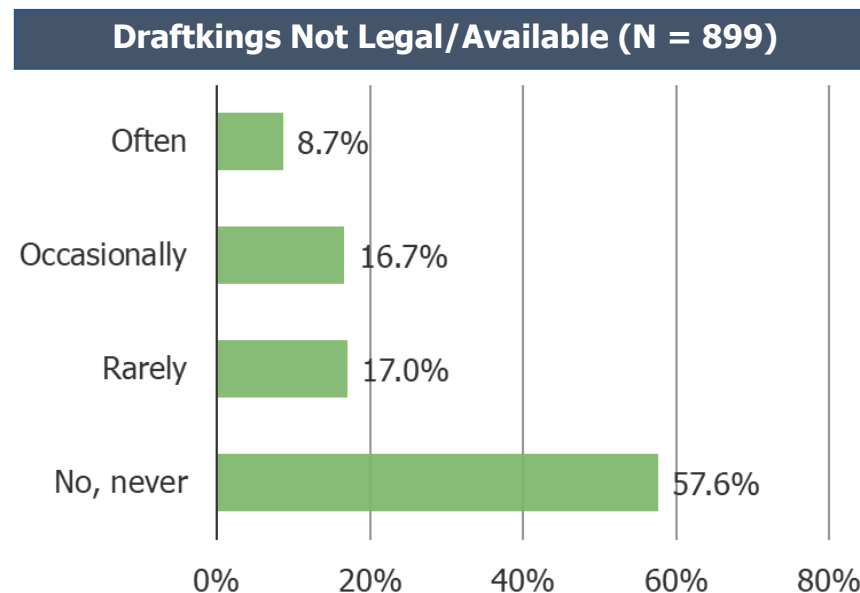
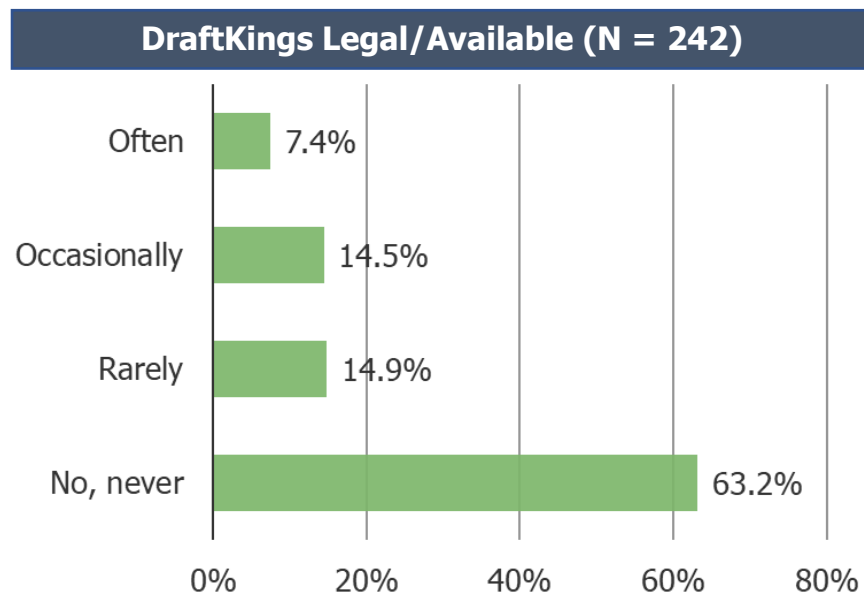
All other states not listed to the left (includes some states in which sports gambling is legal but DraftKings is not yet available).

*From DraftKings Website.

N=1110

Do you ever gamble on sports?

Posed to all respondents.



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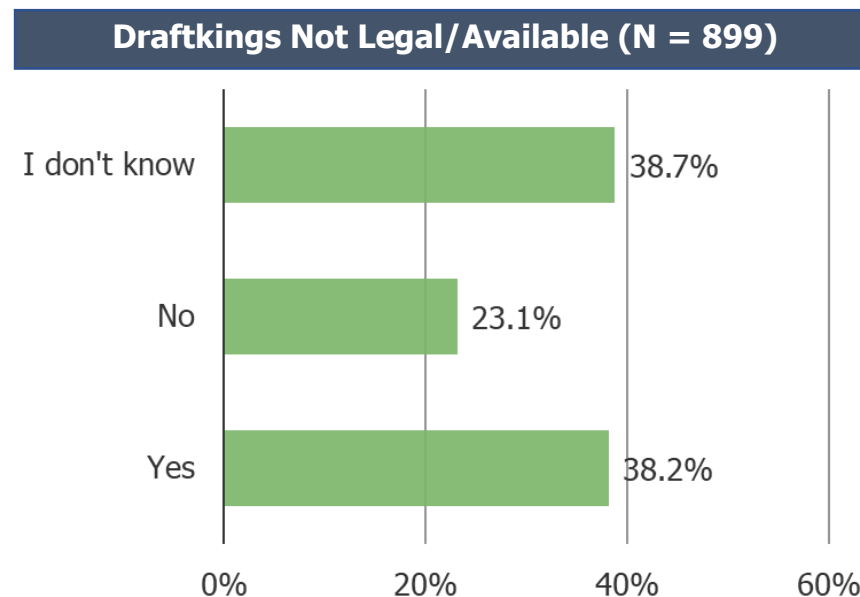
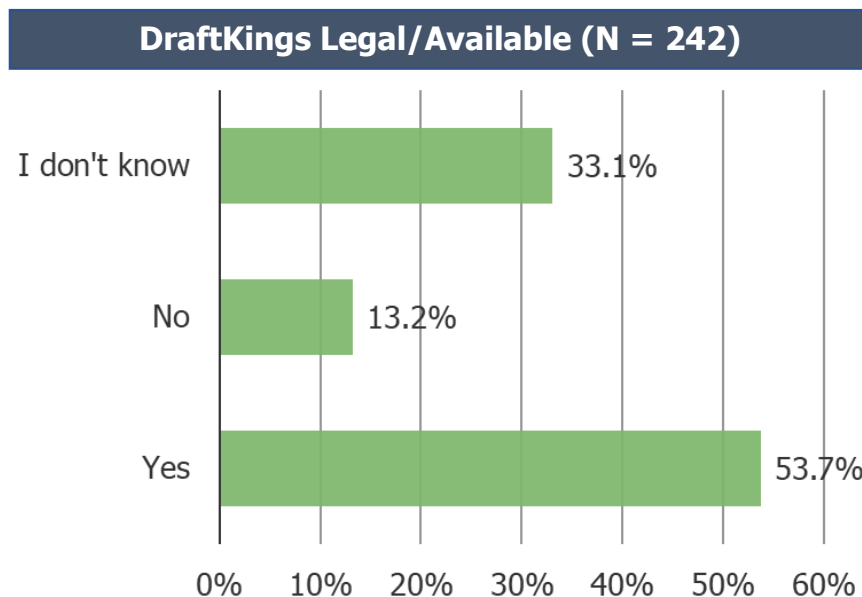
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Is gambling on sports legal in the state that you live in?

Posed to all respondents.



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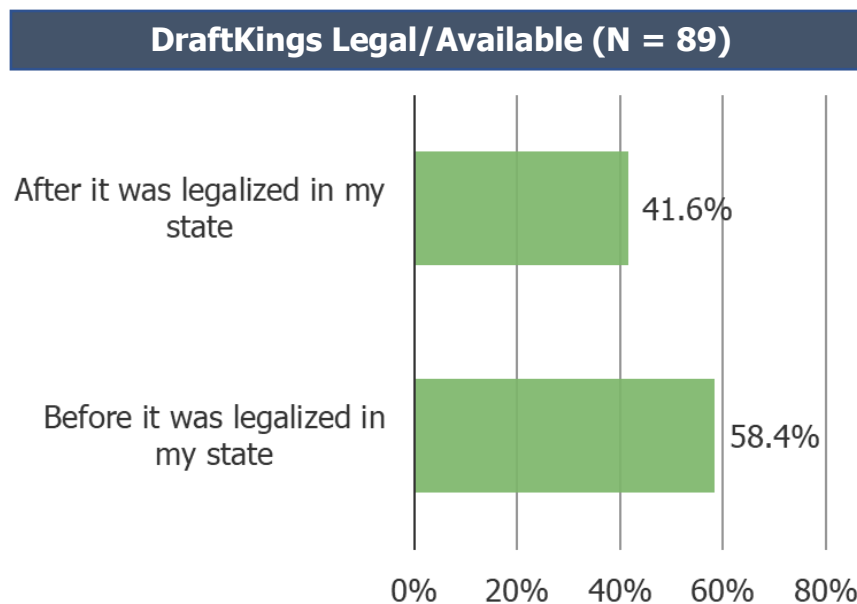
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*From DraftKings Website.

When did you start gambling on sports?

Posed to all respondents who gamble on sports.



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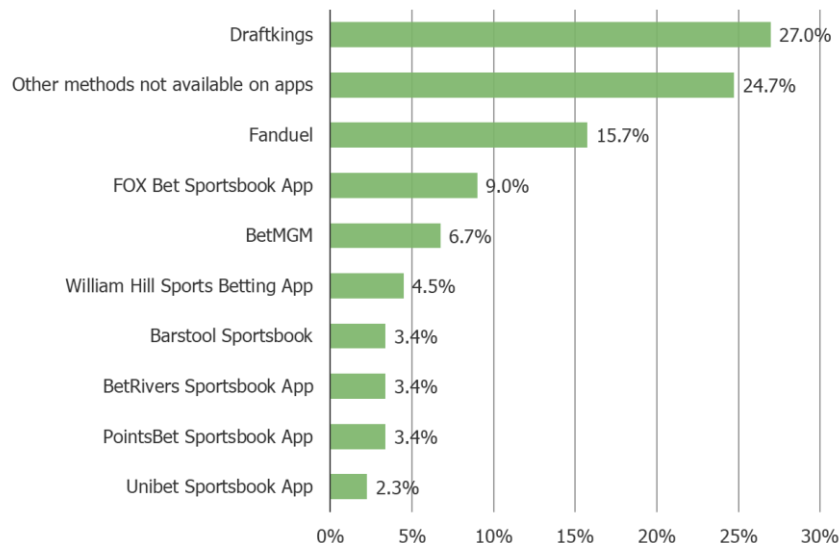
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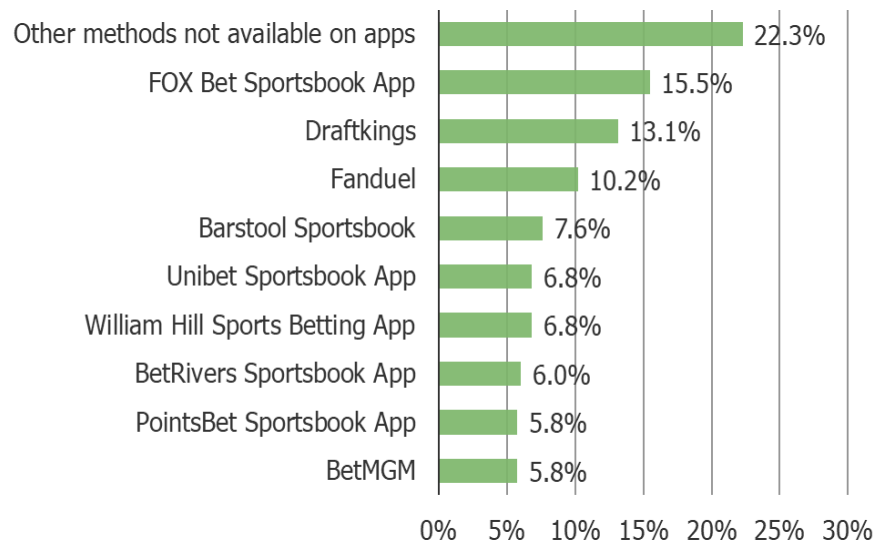
Which is your preference for gambling on sports?

Posed to all respondents who gamble on sports.

DraftKings Legal/Available (N = 89)



DraftKings Not Legal/Available (N = 381)



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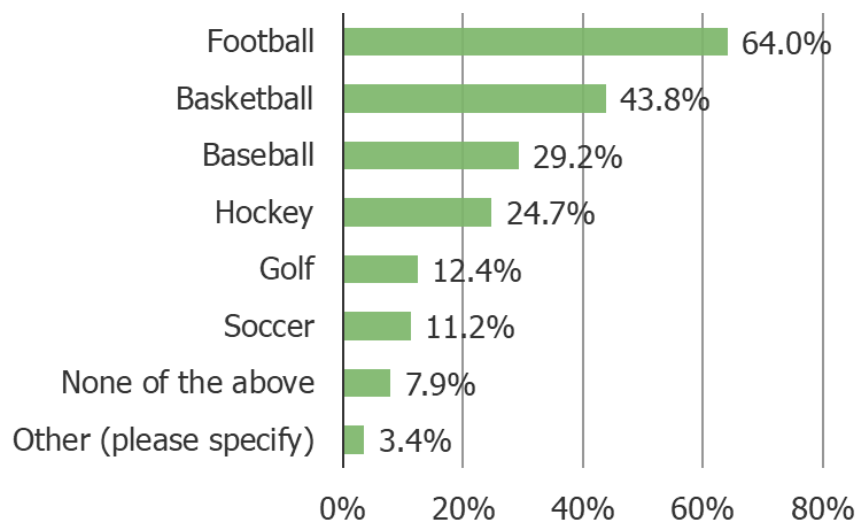
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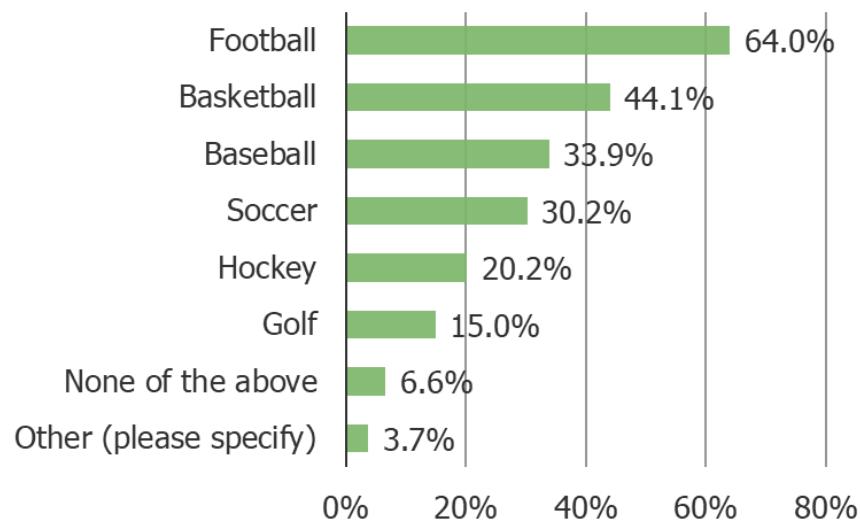
What sports do you gamble on? (Select ALL that apply)

Posed to all respondents who gamble on sports.

DraftKings Legal/Available (N = 89)



DraftKings Not Legal/Available (N = 381)



Cross-Tabs Above: Respondents from states where DraftKings sports gambling is available vs. not legal/not available.

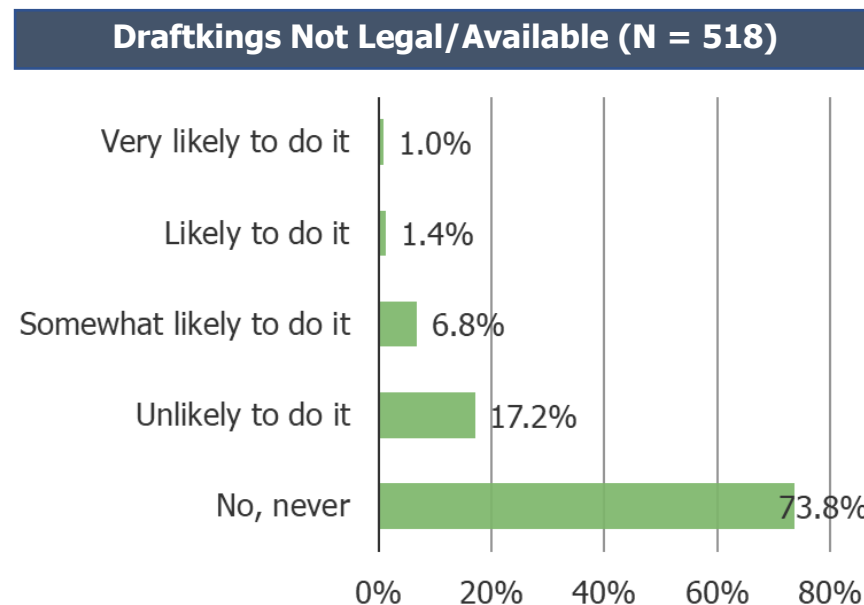
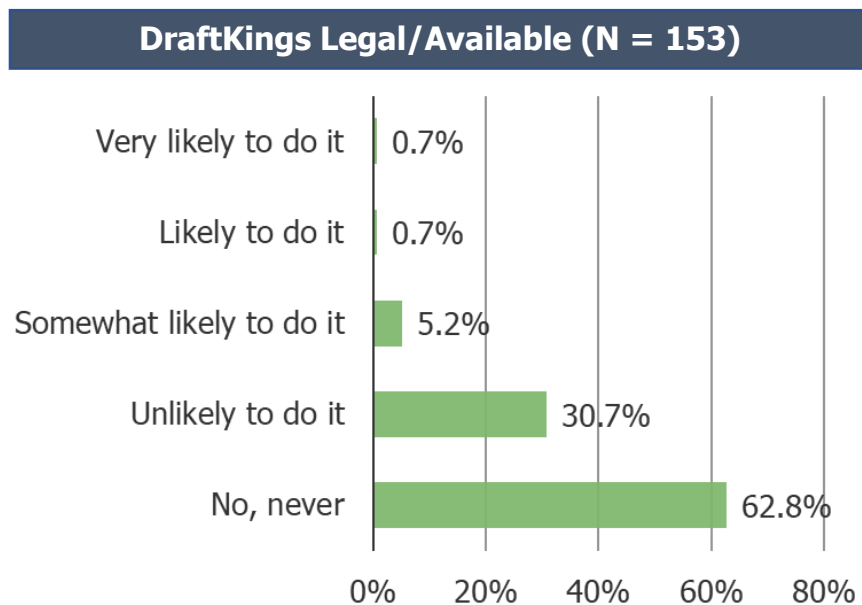
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*From DraftKings Website.

Would you consider gambling on sports in the future?

Posed to all respondents who do not gamble on sports.



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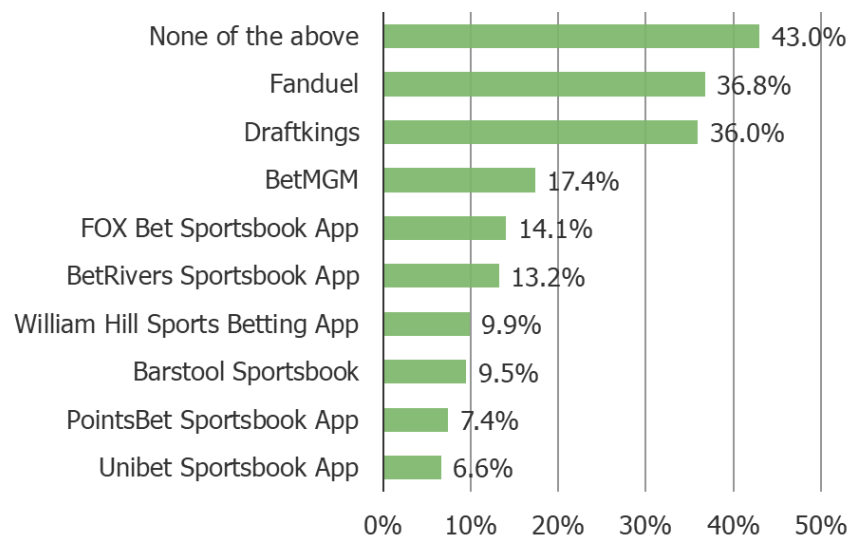
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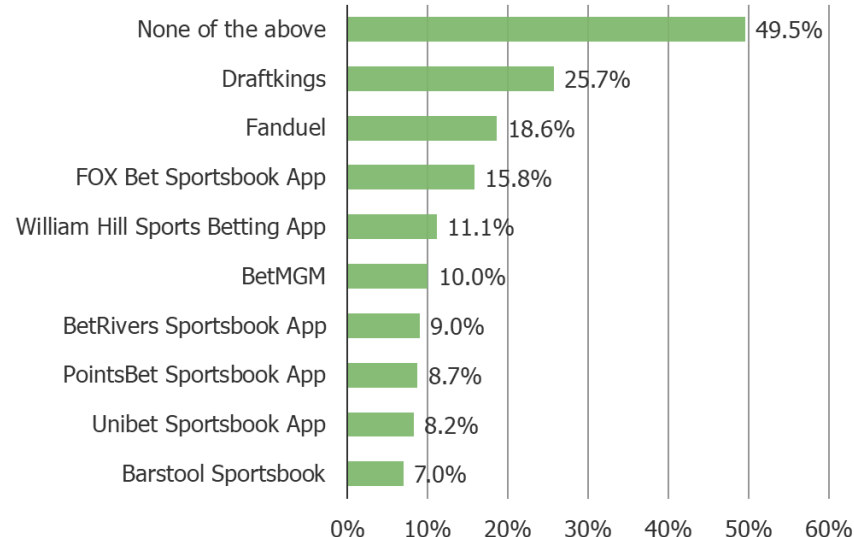
Are you familiar with any of the following sites/apps?

Posed to all respondents.

DraftKings Legal/Available (N = 153)



Draftkings Not Legal/Available (N = 899)



Cross-Tabs Above: Respondents from states where Draftkings sports gambling is available vs. not legal/not available.

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*From Draftkings Website.

What is your opinion of the following?

Posed to all respondents who are familiar with the below.

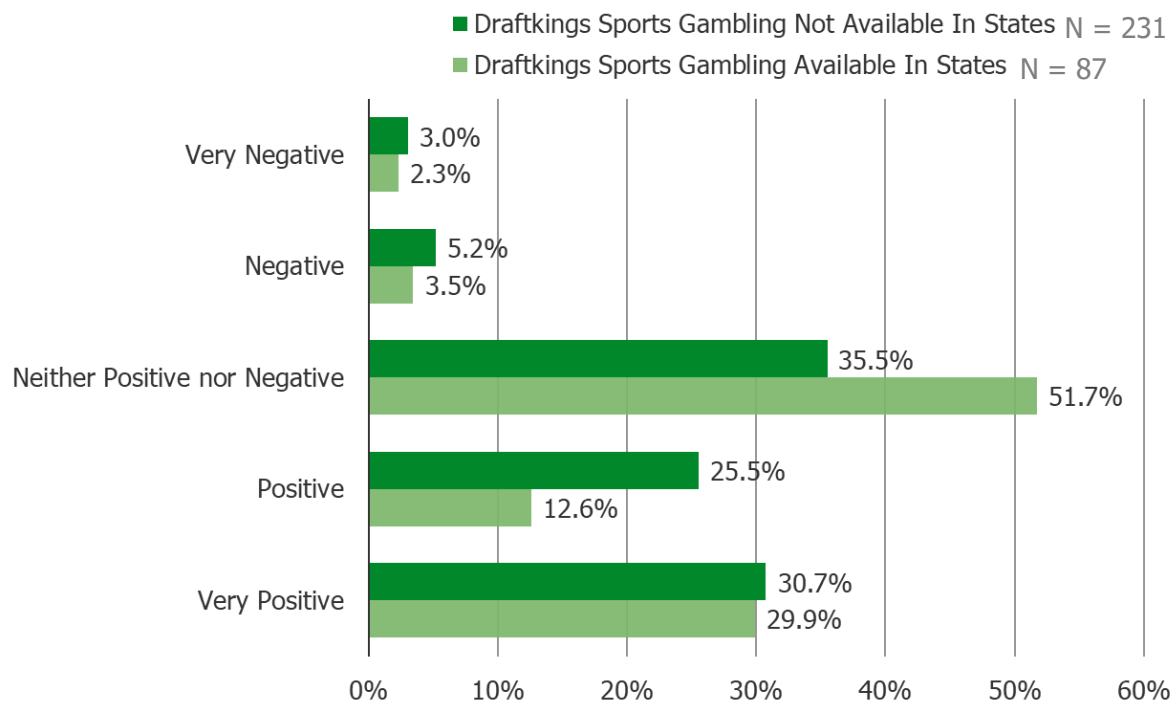


N =

Fanduel	246
Draftkings	309
Barstool Sportsbook	84
BetMGM	129
William Hill Sports Betting App	122
FOX Bet Sportsbook App	172
BetRivers Sportsbook App	110
Unibet Sportsbook App	89
PointsBet Sportsbook App	95

What is your opinion of Draftkings?

Posed to all respondents who are familiar with the below.



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Sports Gambling

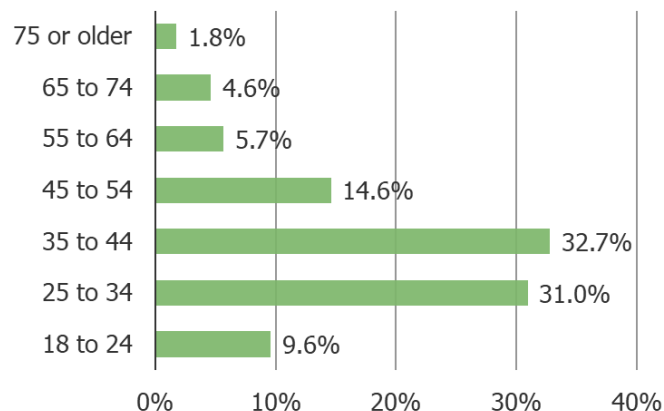
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Monthly Tracker Data

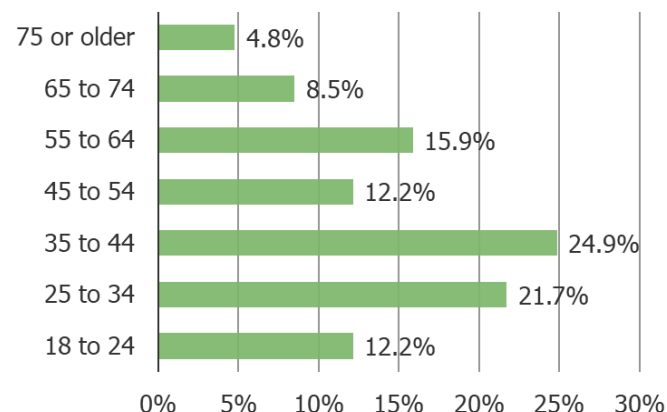
Do you ever gamble on sports? AGE

Comparing respondents based on how often they gamble on sports.

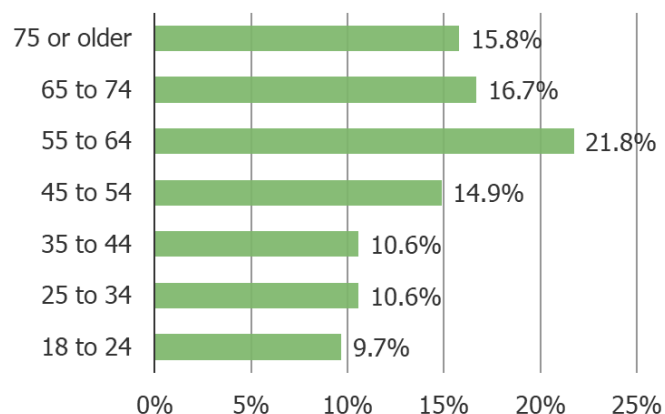
Gambles on Sports Occasionally/Often (N = 218)



Gambles on Sports Rarely (N = 189)



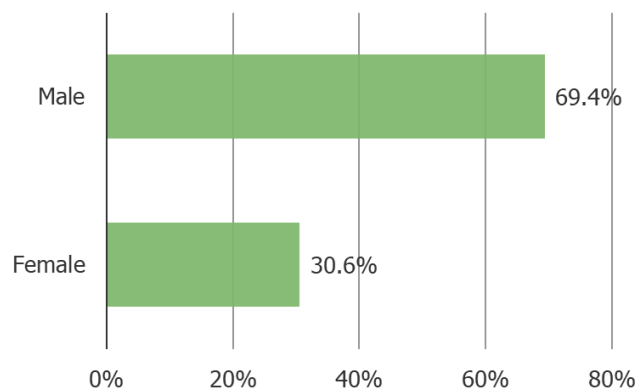
Gambles on Sports Never (N = 671)



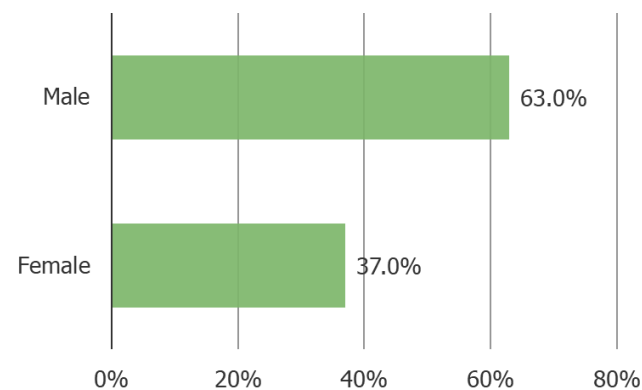
Do you ever gamble on sports? **GENDER**

Comparing respondents based on how often they gamble on sports.

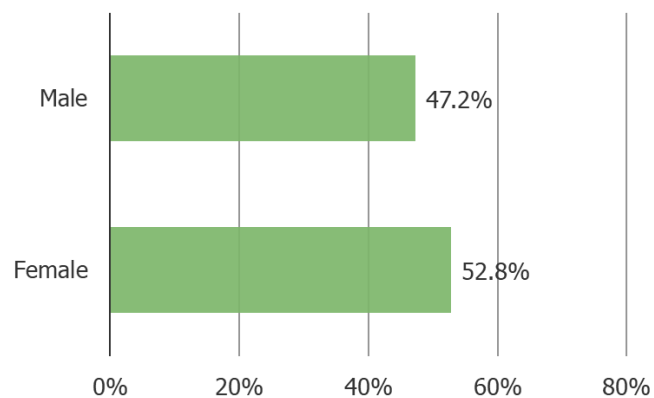
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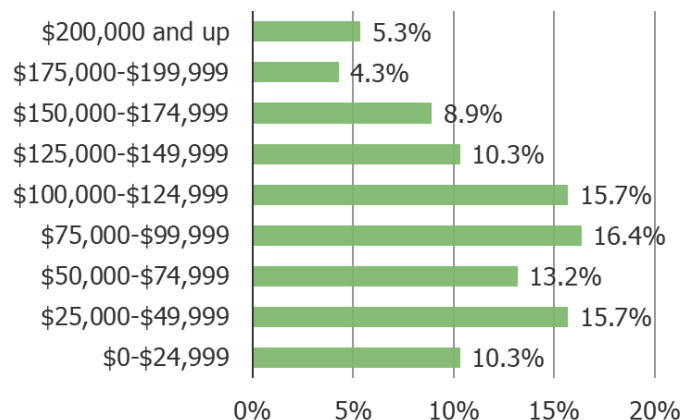
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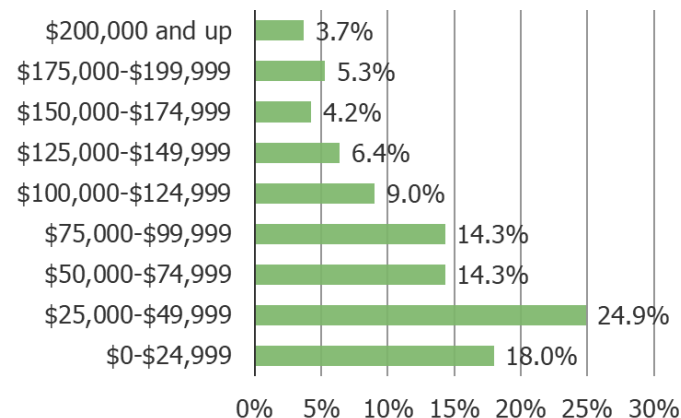
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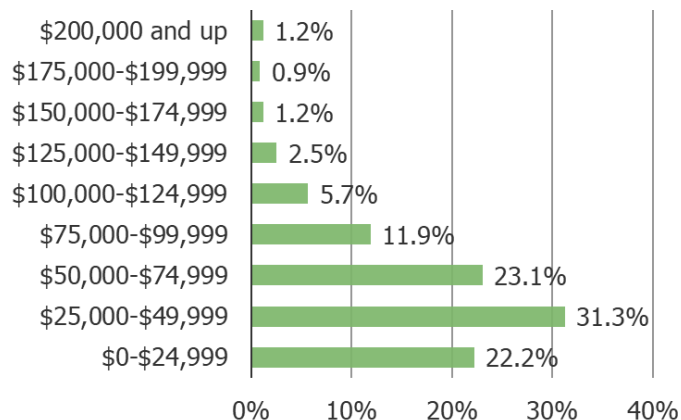
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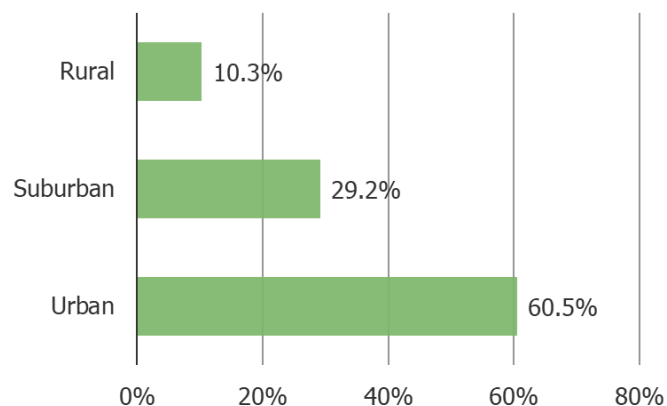
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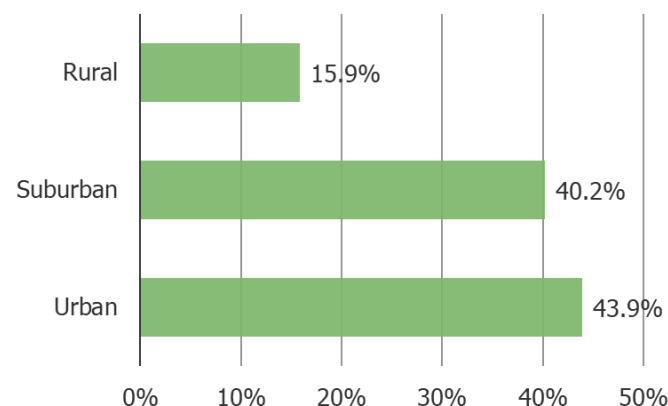
Do you ever gamble on sports? **LIVING AREA**

Comparing respondents based on how often they gamble on sports.

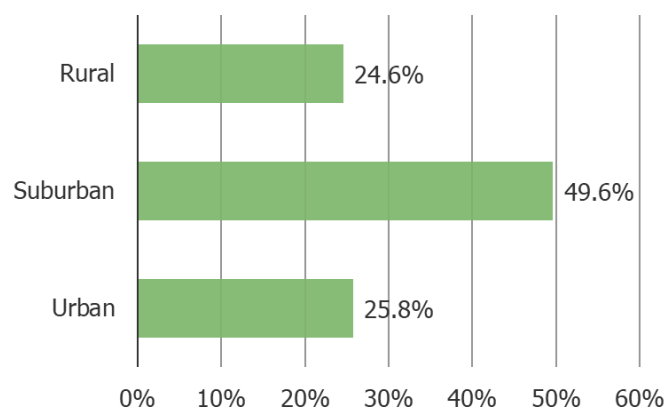
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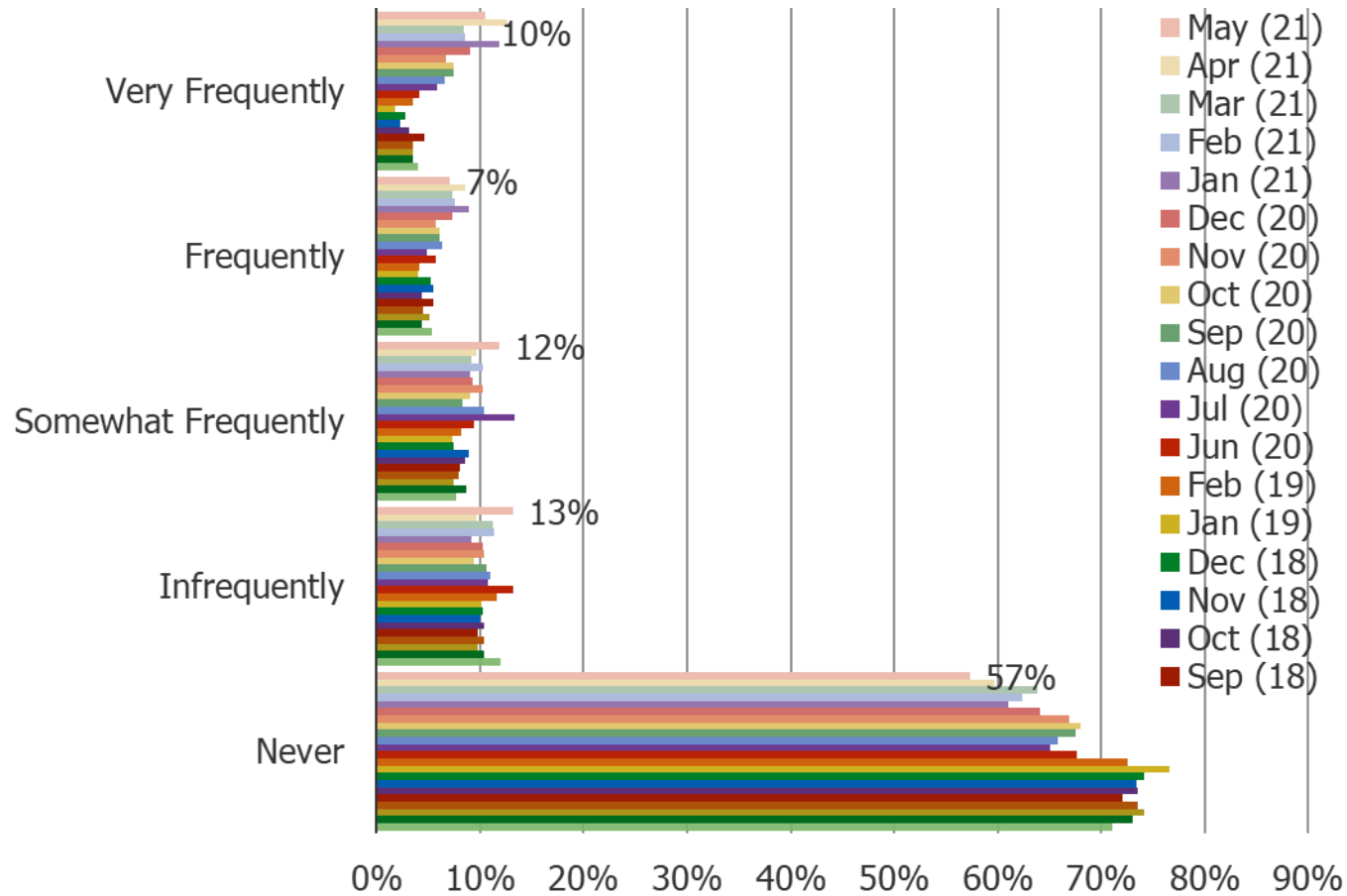
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How often do you gamble on sports?

Posed to all respondents.



How often do you gamble on sports? (weighted average)

Posed to all respondents over the past year, aggregated and cross-tabbed by state.

