

Bespoke Survey Research

August 2023

Gambling

Volume 8 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: DKNG, MGM, Fanduel.

KPIs and Key questions

1. Sports watching frequency is mostly unchanged over-time.
2. The share of consumers who gamble on sports is generally unchanged, but among those who do, a higher share report increases recently (30.4%) compared to those who call out decreases (20.8%). The same is true of their expectations going forward.
3. Draftkings is the most popular app in our survey. However, we would also flag that over the history of our survey, the percentage of sports gamblers who flag Draftkings as their favorite has declined.
4. Over the history of our survey, sports gamblers have been increasingly likely to say they use more than one app to gamble on sports.
5. Among those who do not gamble on sports, most are very unlikely to start. This data really has not changed much sequentially over time.

Noteworthy Stats:

26.8% Of respondents watch sports very often.

10.1% Of respondents said they gamble on sports often.

30.4% Of respondents who gamble on sports more often than never note they recently increased how often they gamble on sports.

31.3% Of respondents who gamble on sports more often than never say they will increase how often they gamble on sports.

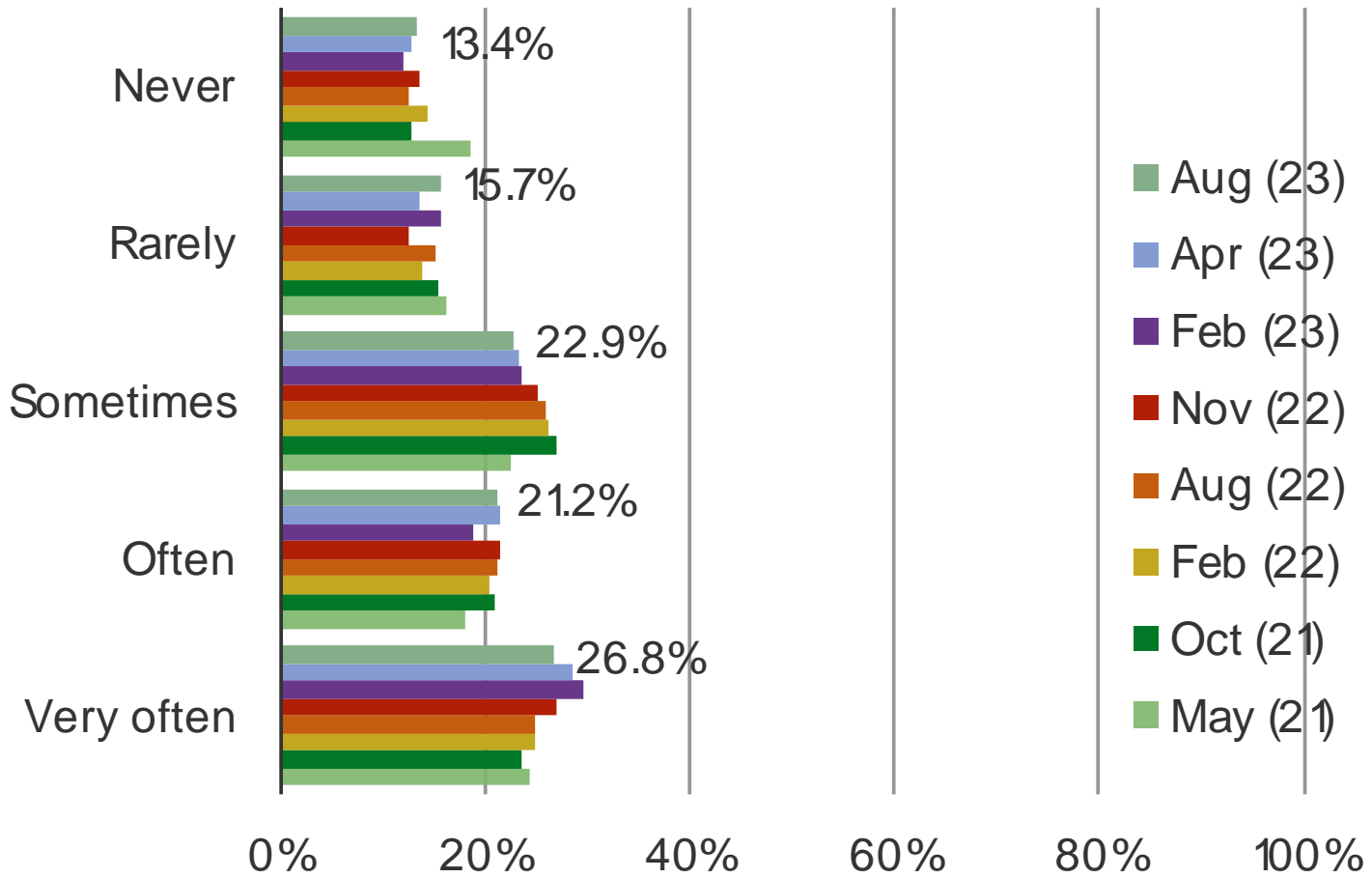
15.8% Of respondents who gamble on sports more often than never note that they prefer to use DraftKings for sports gambling.

Gambling

GAMBLING

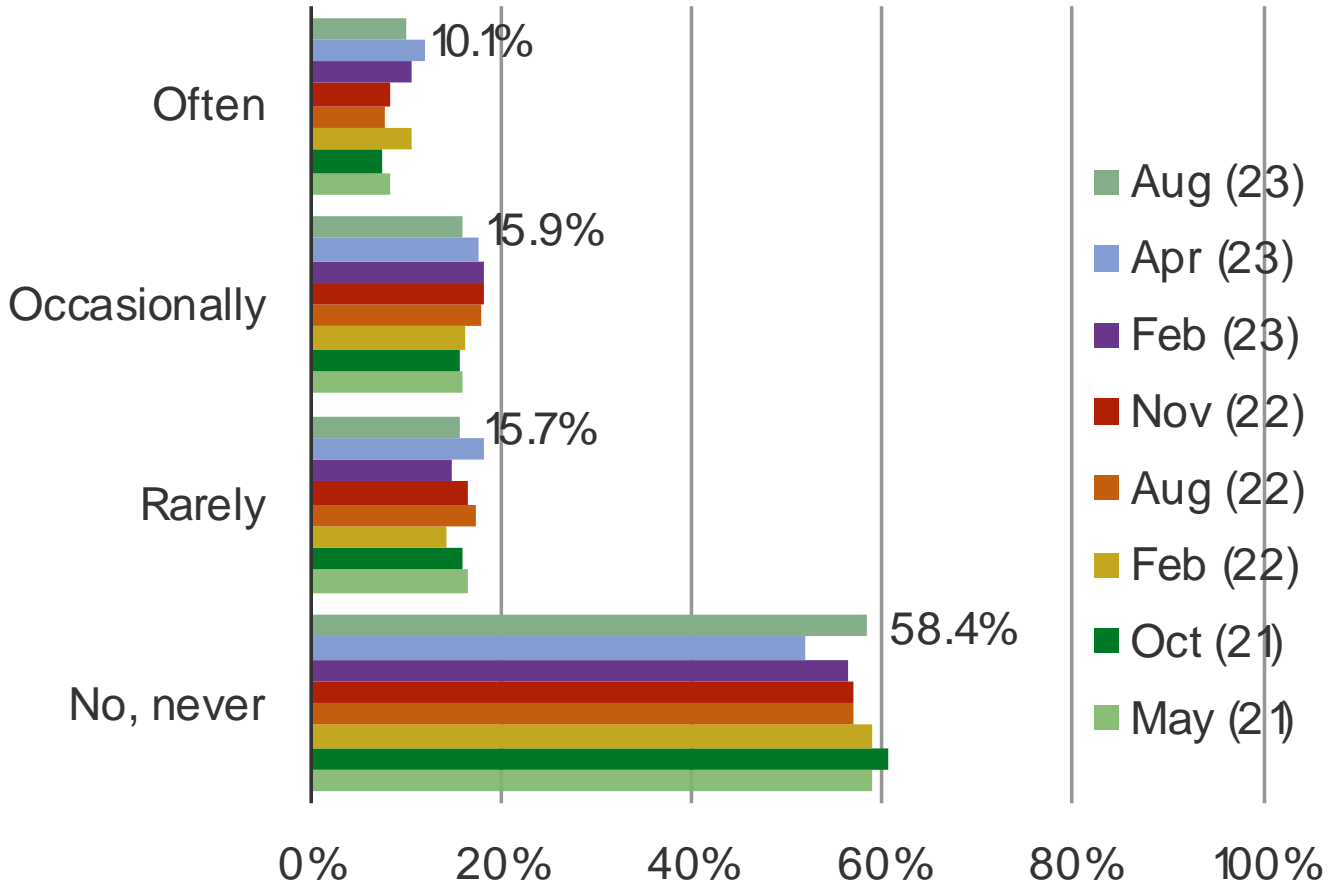
HOW OFTEN DO YOU WATCH SPORTS?

Posed to all respondents.



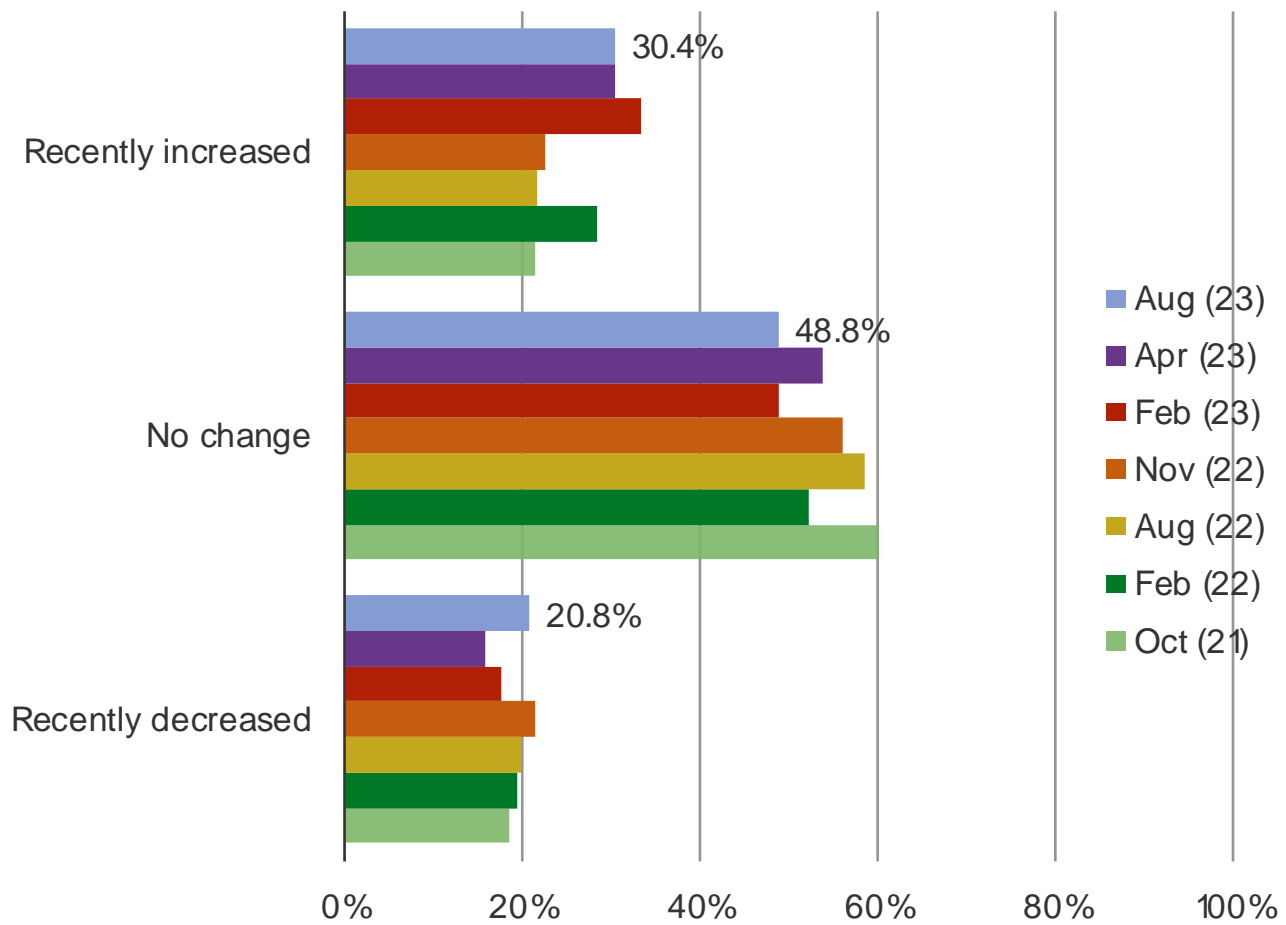
DO YOU EVER GAMBLE ON SPORTS?

Posed to all respondents.



HAVE YOU RECENTLY CHANGED HOW OFTEN YOU GAMBLE ON SPORTS?

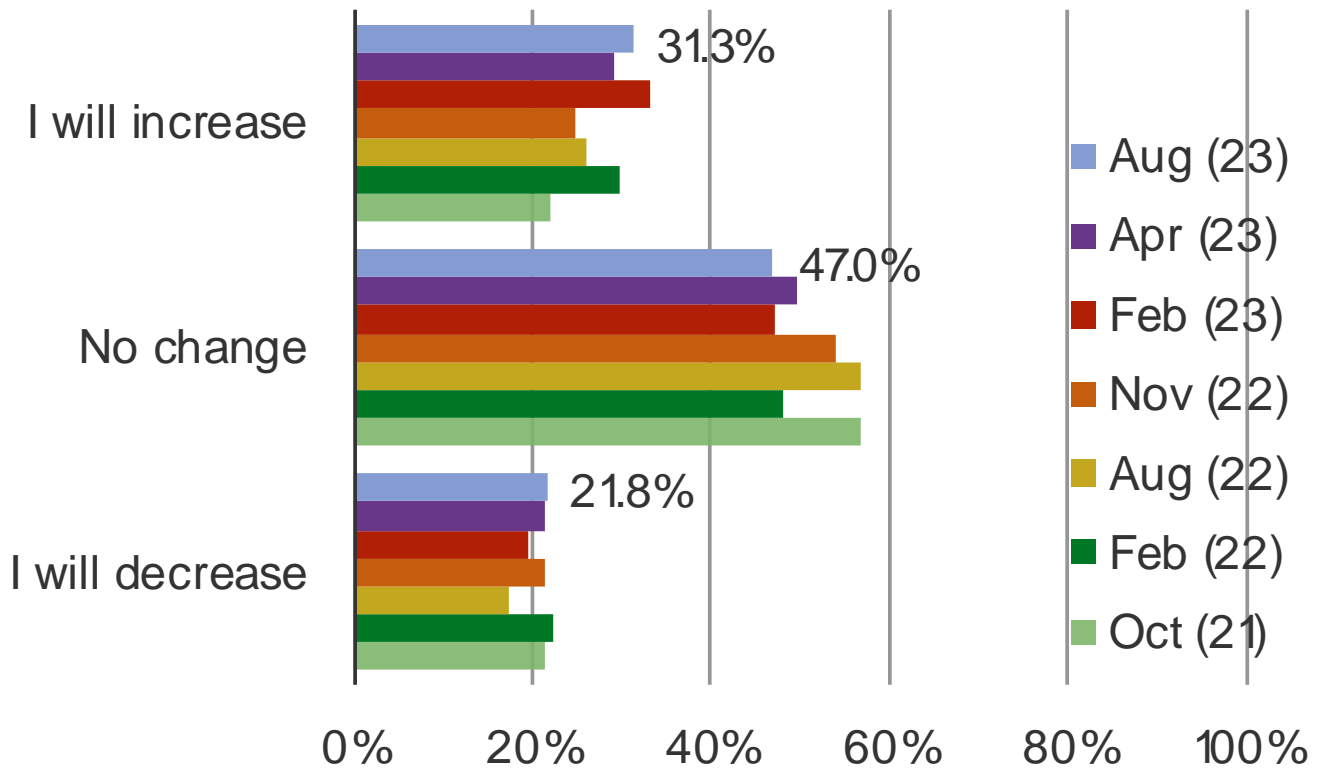
Posed to all respondents who gamble on sports more often than never.



Gambling

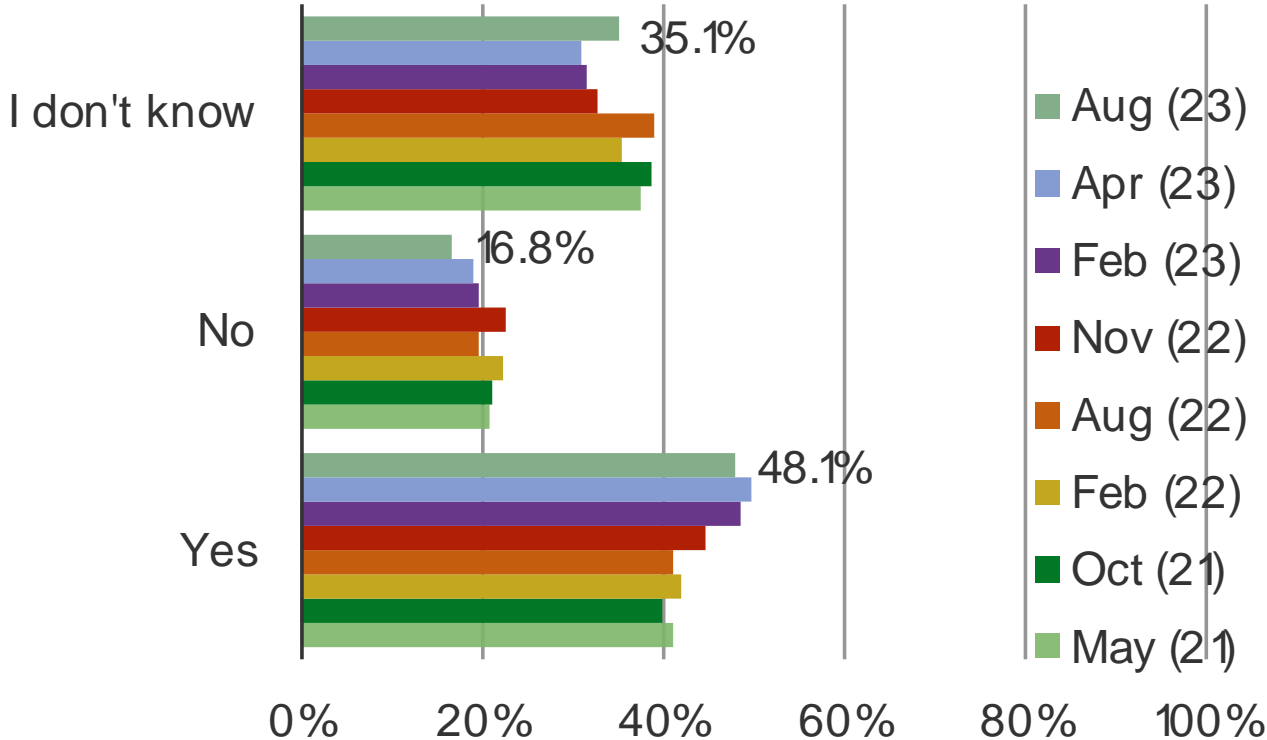
GOING FORWARD, DO YOU EXPECT THAT YOU WILL INCREASE OR DECREASE HOW OFTEN YOU GAMBLE ON SPORTS?

Posed to all respondents who gamble on sports more often than never.



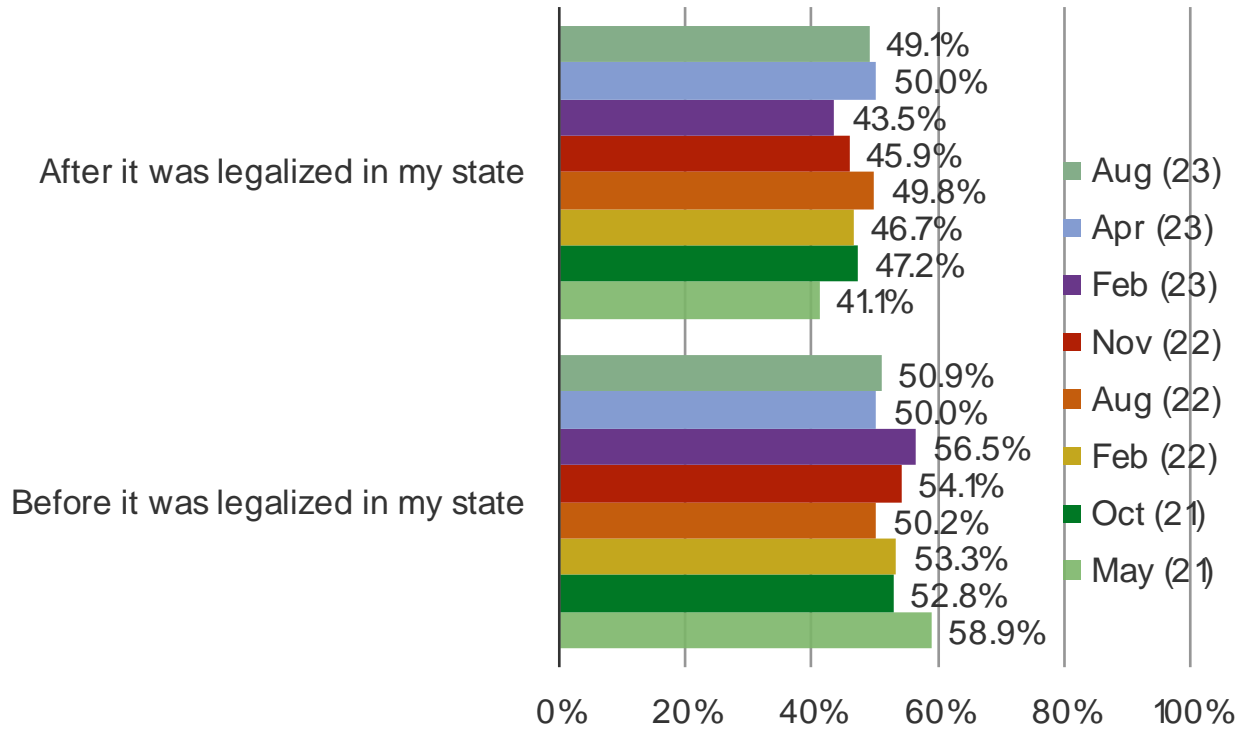
IS GAMBLING ON SPORTS LEGAL IN THE STATE THAT YOU LIVE IN?

Posed to all respondents.



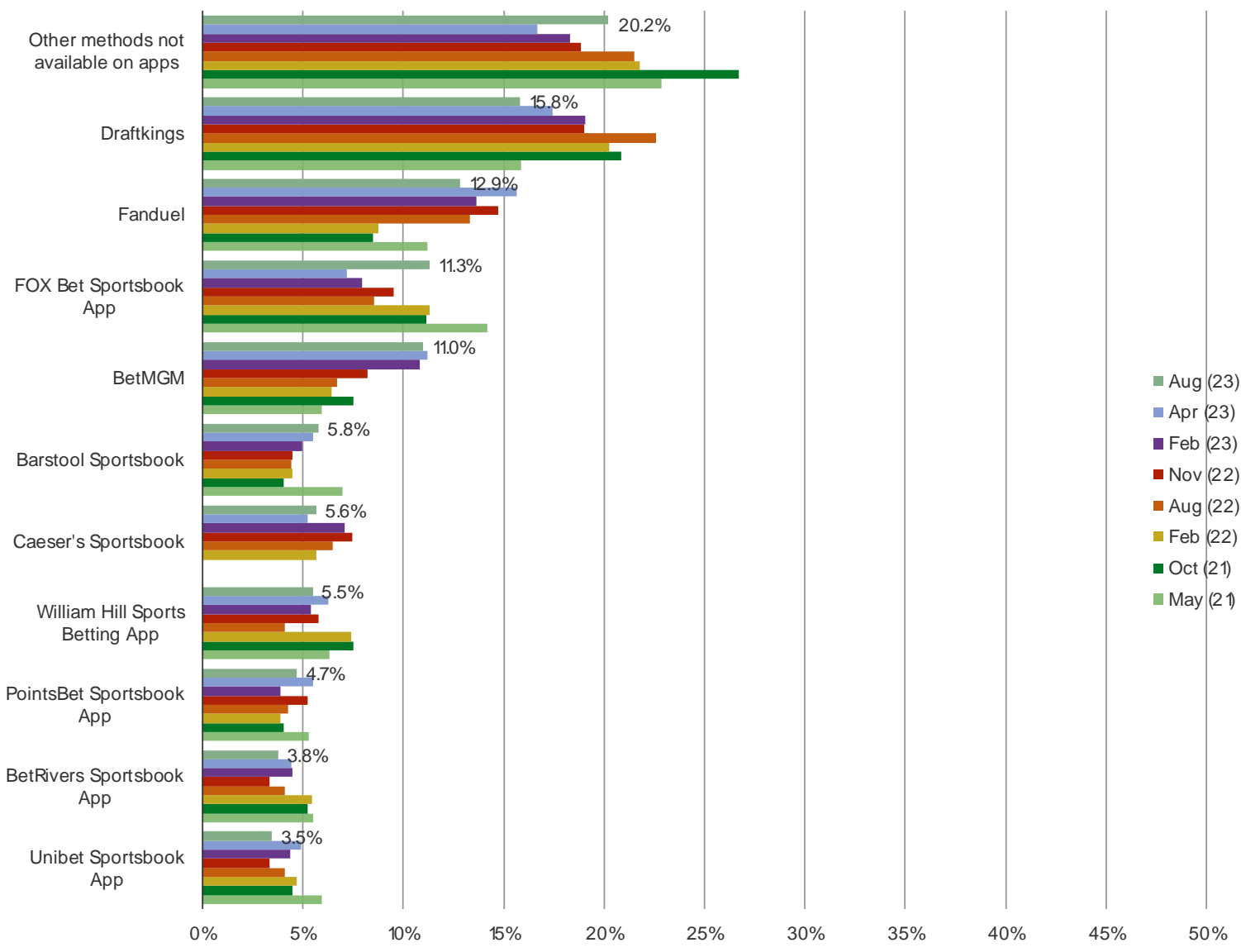
WHEN DID YOU START GAMBLING ON SPORTS?

Posed to all respondents who gamble on sports more often than never.



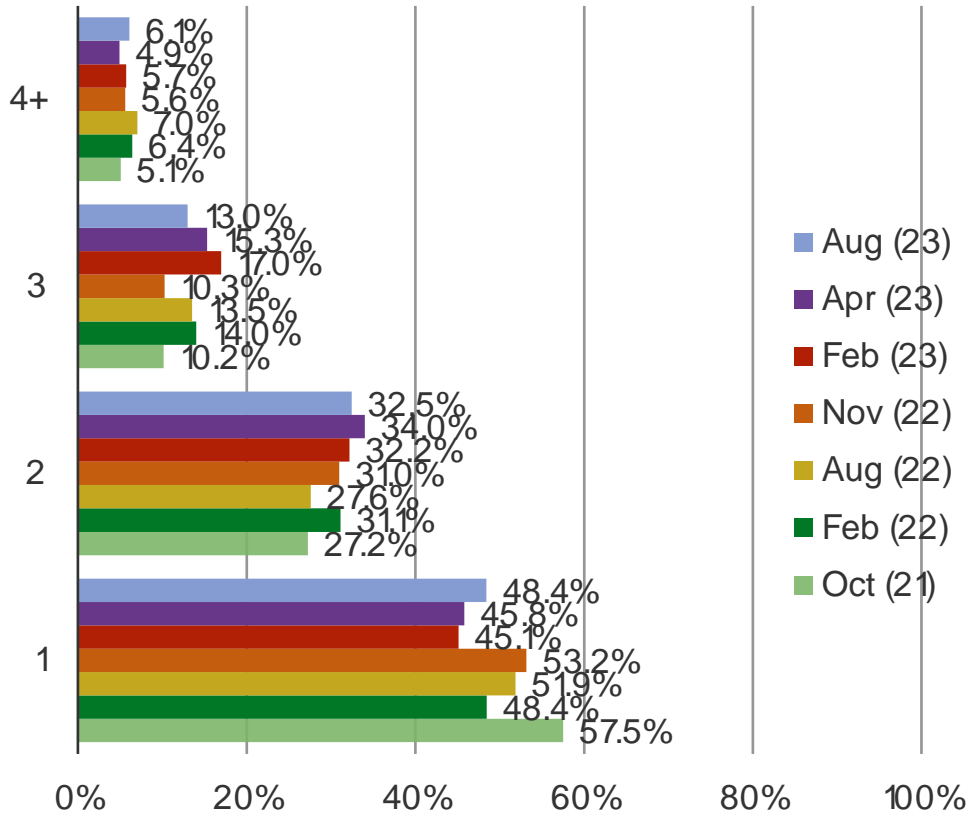
WHICH IS YOUR PREFERENCE FOR GAMBLING ON SPORTS?

Posed to all respondents who gamble on sports more often than never.



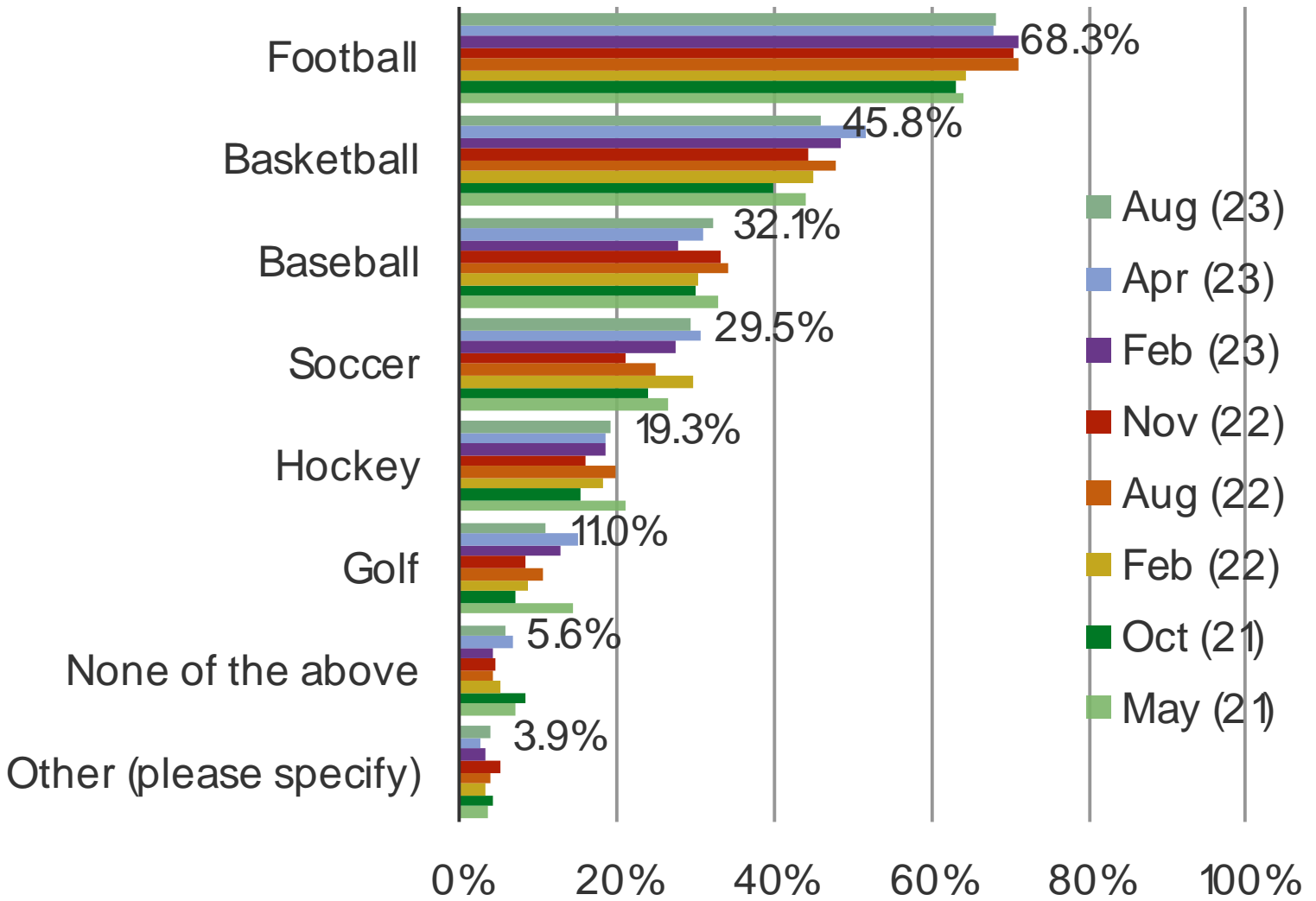
HOW MANY SPORTS GAMBLING APPS DO YOU USE?

Posed to all respondents who gamble on sports more often than never.



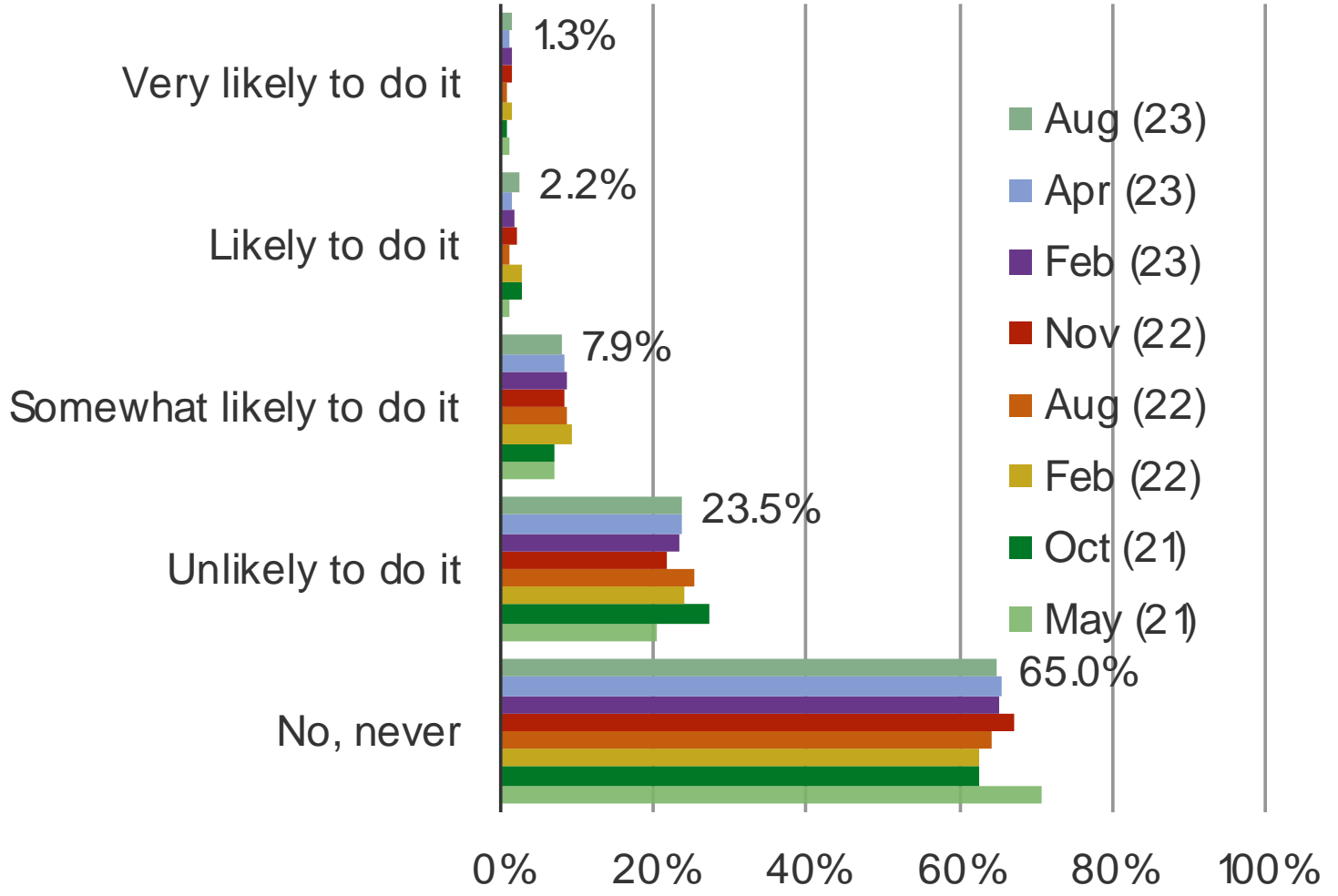
WHAT SPORTS DO YOU GAMBLE ON? (SELECT ALL THAT APPLY)

Posed to all respondents who gamble on sports more often than never.



WOULD YOU CONSIDER GAMBLING ON SPORTS IN THE FUTURE?

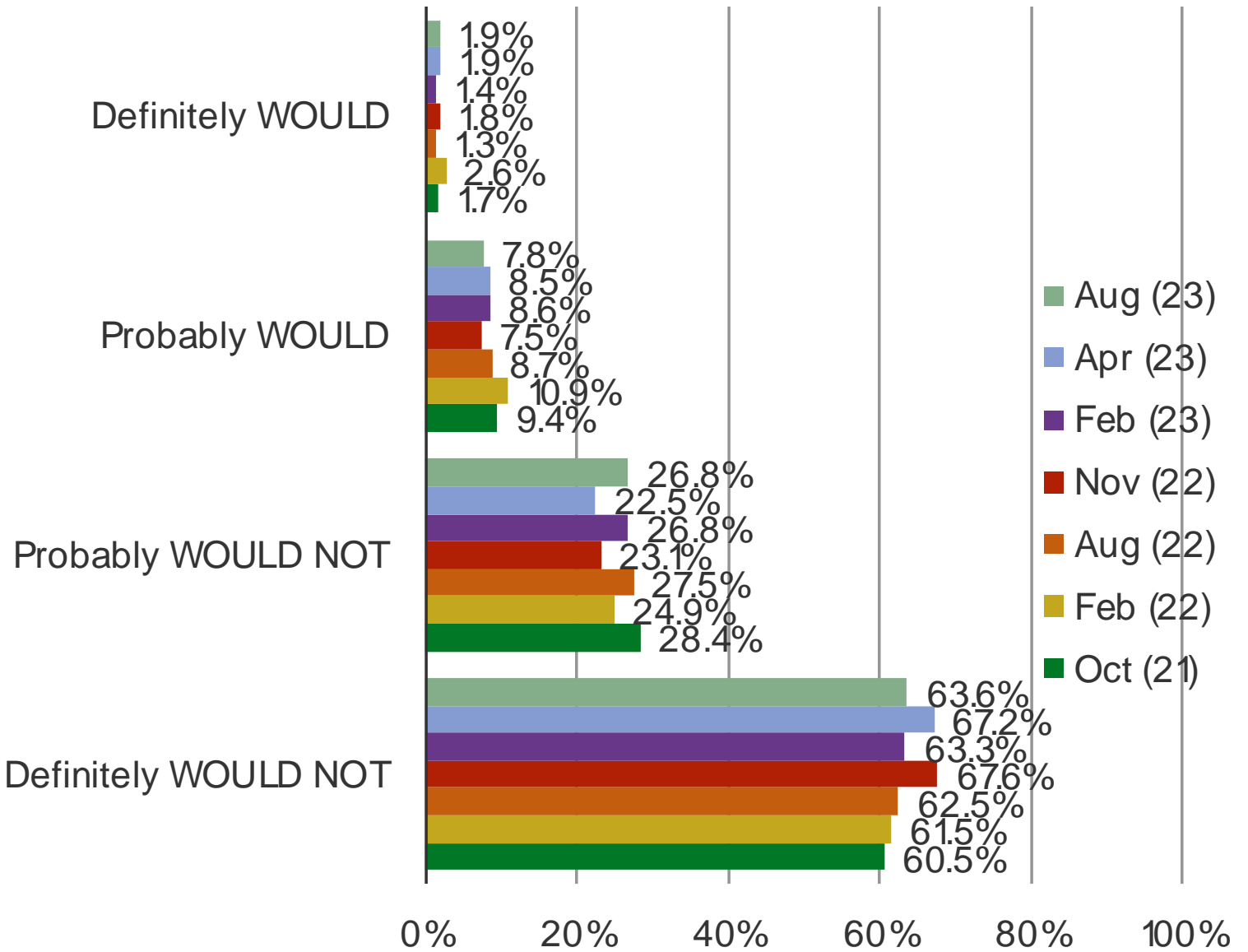
Posed to all respondents who do not currently gamble on sports.



Gambling

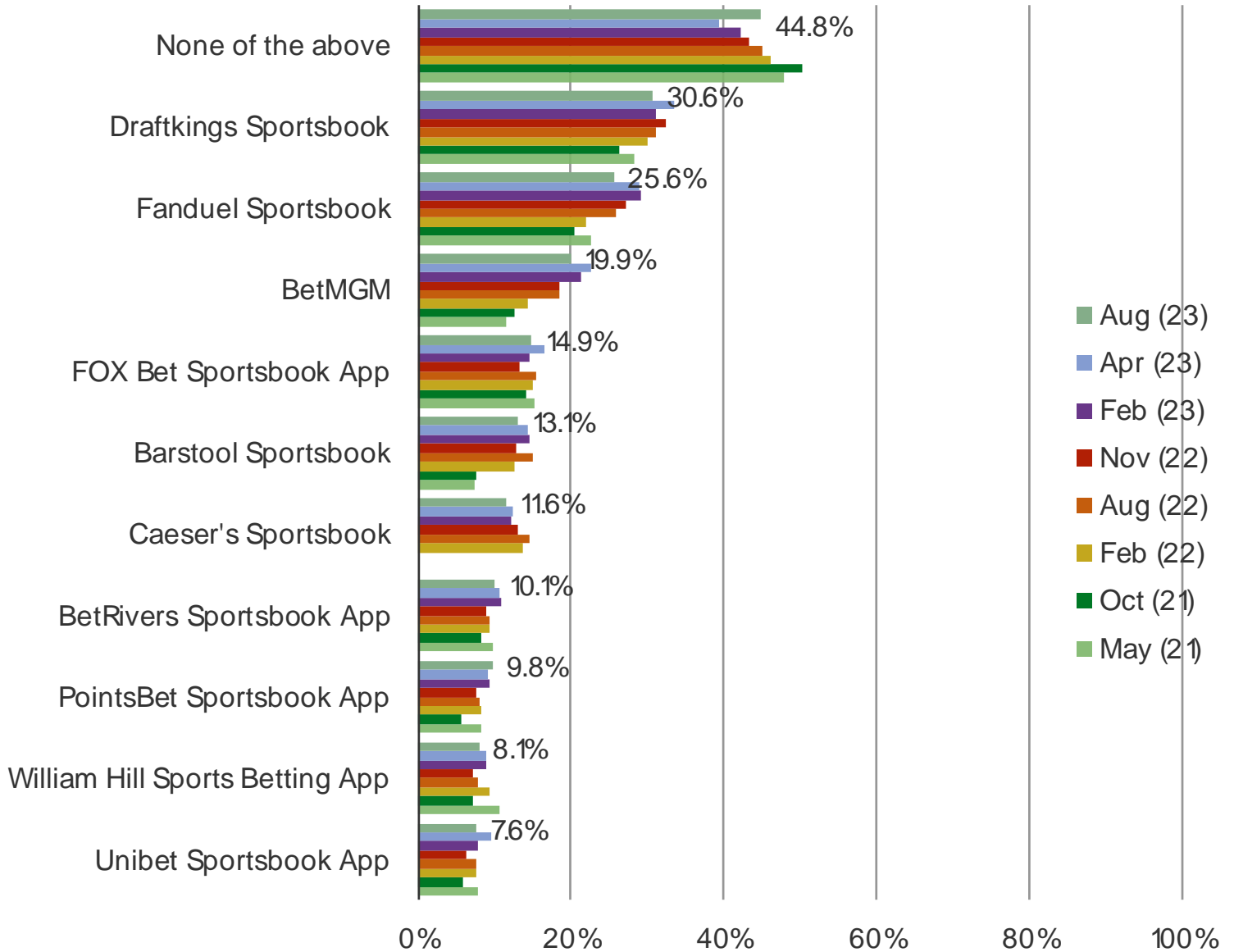
IF SPORTS GAMBLING BECAME LEGAL IN YOUR STATE, WOULD YOU BE INTERESTED IN GAMBLING ON SPORTS?

Posed to respondents who either said sports gambling is not legal in their state or they don't know if sports gambling is legal in their state.



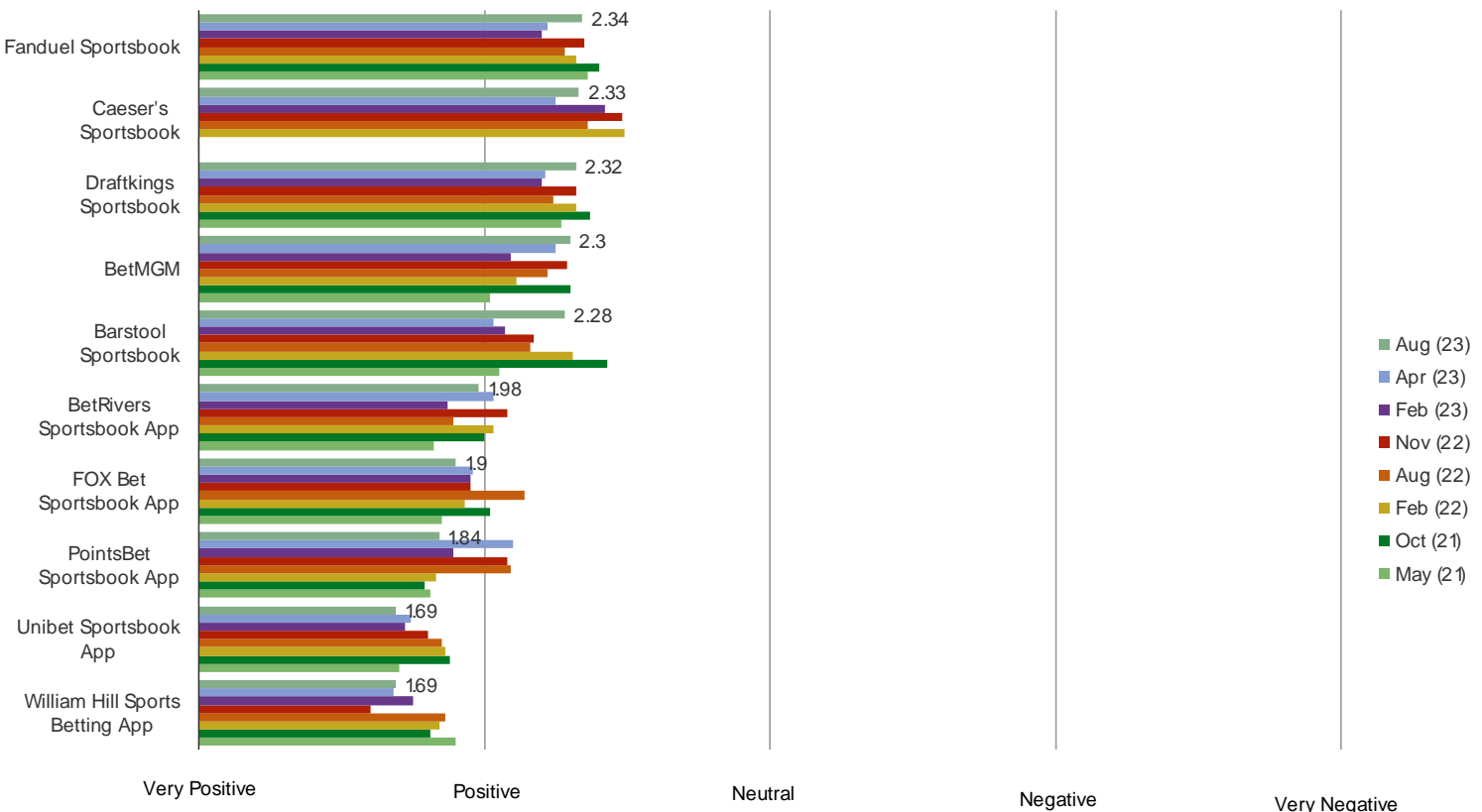
ARE YOU FAMILIAR WITH ANY OF THE FOLLOWING SITES/APPS?

Posed to all respondents.



WHAT IS YOUR OPINION OF THE FOLLOWING?

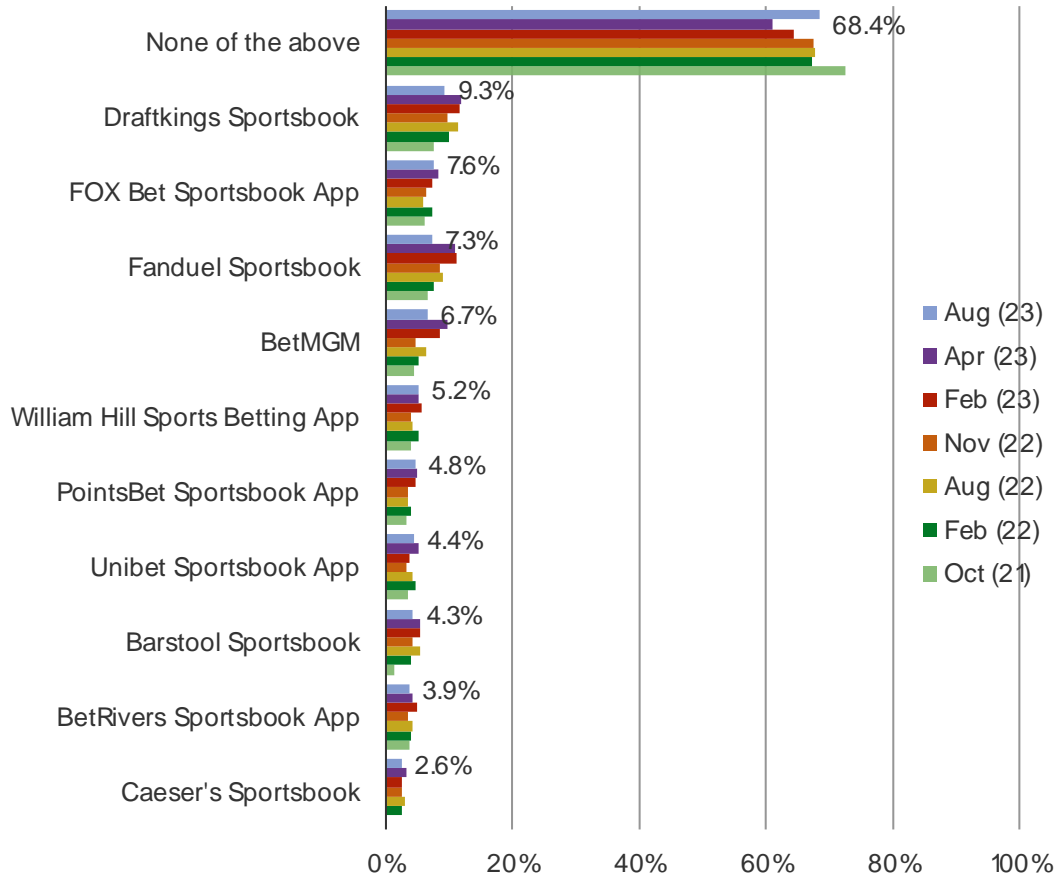
Posed to all respondents.



	N=
Draftkings Sportsbook	469
Fanduel Sportsbook	392
BetMGM	305
William Hill Sports Betting App	124
FOX Bet Sportsbook App	228
PointsBet Sportsbook App	150
Unibet Sportsbook App	117
BetRivers Sportsbook App	154
Barstool Sportsbook	200
Caeser's Sportsbook	177

DO YOU HAVE ANY OF THE FOLLOWING DOWNLOADED ON YOUR PHONE?

Posed to all respondents.



Cross-over between downloaded apps...

Also uses...

Has Downloaded	Draftkings Sportsbook	Fanduel Sportsbook	BetMGM	William Hill Sports Betting App	FOX Bet Sportsbook App	PointsBet Sportsbook App	Unibet Sportsbook App	BetRivers Sportsbook App	Barstool Sportsbook	Caeser's Sportsbook	N=
Draftkings Sportsbook		29.4%	17.5%	11.9%	19.6%	14.7%	13.3%	11.2%	13.3%	9.8%	143
Fanduel Sportsbook	37.5%		25.0%	10.7%	13.4%	16.1%	13.4%	14.3%	15.2%	14.3%	112
BetMGM	24.3%	27.2%		13.6%	18.5%	15.5%	17.5%	13.6%	11.7%	15.5%	103
William Hill Sports Betting App	21.3%	15.0%	17.5%		37.5%	17.5%	22.5%	23.8%	21.3%	13.8%	80
FOX Bet Sportsbook App	24.1%	12.9%	16.4%	25.9%		17.2%	22.4%	12.9%	12.9%	9.5%	116
PointsBet Sportsbook App	28.8%	24.7%	21.9%	19.2%	27.4%		21.9%	20.6%	23.3%	12.3%	73
Unibet Sportsbook App	27.9%	22.1%	26.5%	26.5%	38.2%	23.5%		20.6%	16.2%	13.2%	68
BetRivers Sportsbook App	27.1%	27.1%	23.7%	32.2%	25.4%	25.4%	23.7%		23.7%	15.3%	59
Barstool Sportsbook	28.8%	25.8%	18.2%	25.8%	22.7%	25.8%	16.7%	21.2%		16.7%	66
Caeser's Sportsbook	35.0%	40.0%	40.0%	27.5%	27.5%	22.5%	22.5%	22.5%	27.5%		40

HAVE YOU EVER PLACED A BET ON ANY OF THE FOLLOWING APPS? (SELECT ALL THAT APPLY)

Posed to all respondents.

