

# Bespoke Survey Research

November 2023

## Gambling

Volume 9 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: DKNG, MGM, Fanduel.

### KPIs and Key questions

1. Sports watching frequency is tracking slightly higher q/q. The share of respondents who gamble on sports is basically unchanged q/q.
2. Among those who do gamble on sports, a higher percentage think their gambling frequency has increased compared to the share who say decreased.
3. The majority of respondents who gamble on sports more often than never note that they have not changed how often they gamble on sports.
4. Among respondents who gamble on sports, many use more than one app to do so, and the general trend has been a slow increase in the average number of apps used per gambler across survey volumes.
5. Turning to TAM, likelihood of starting to gamble on sports among those who said they don't do it is quite low (and has been consistently low each time we run this survey).
6. In terms of platforms, DraftKings remains the top preferred app for users.

### Noteworthy Stats:

**28.9%** Of respondents watch sports very often.

**9.7%** Of respondents said they gamble on sports often.

**27.2%** Of respondents who gamble on sports more often than never note they recently increased how often they gamble on sports.

**29.3%** Of respondents who gamble on sports more often than never say they will increase how often they gamble on sports.

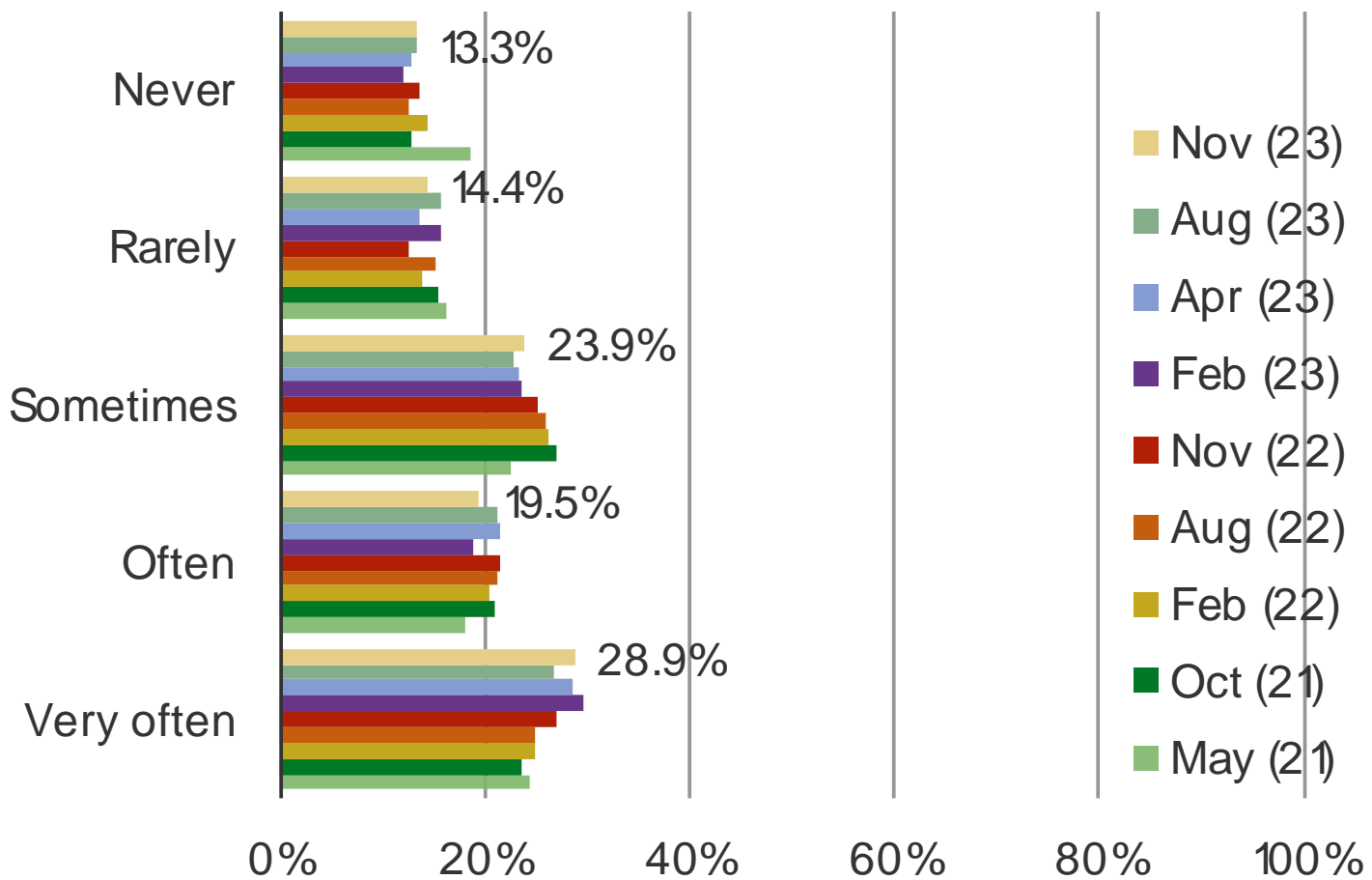
**17.1%** Of respondents who gamble on sports more often than never note that they prefer to use DraftKings for sports gambling.

# Gambling

## GAMBLING

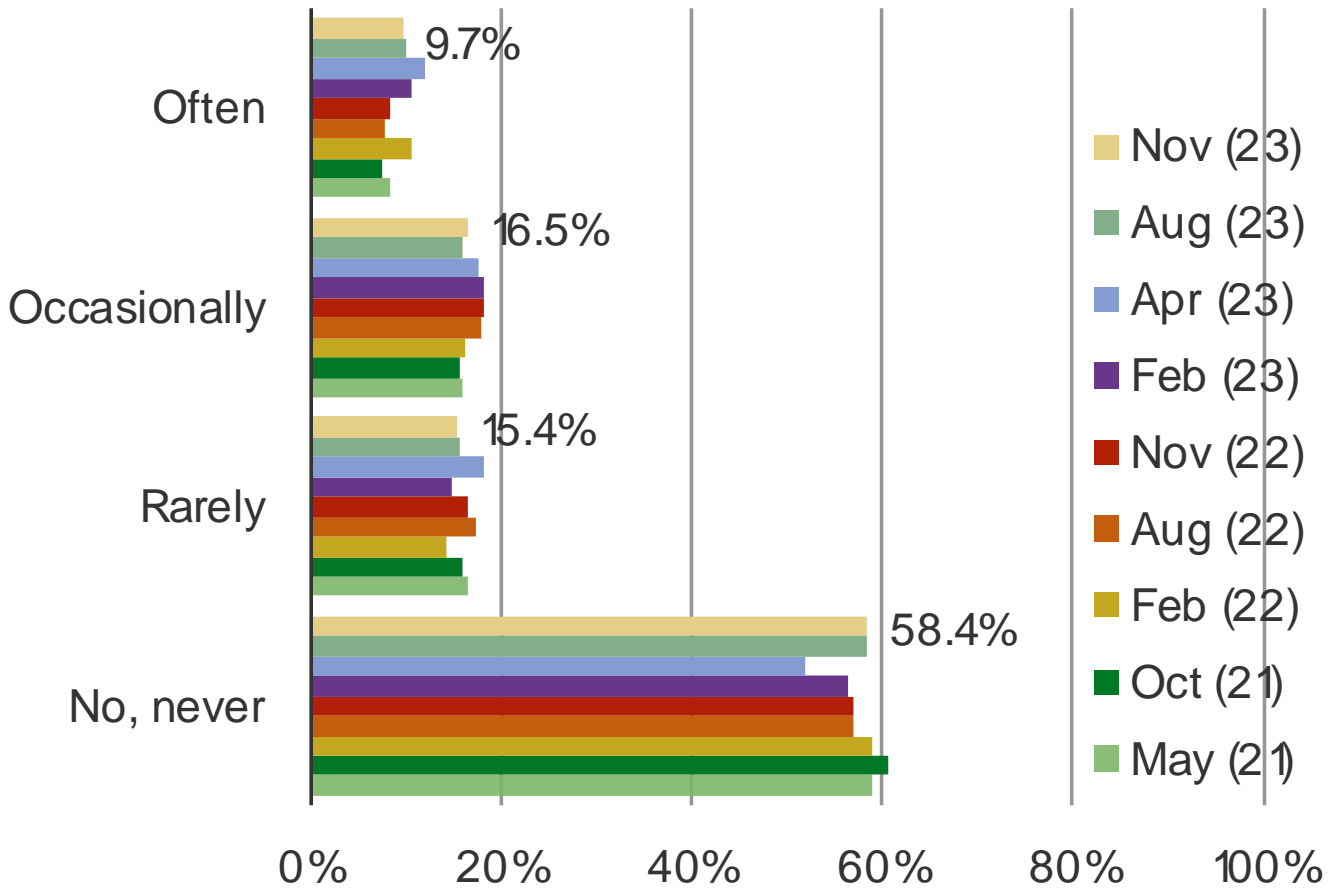
HOW OFTEN DO YOU WATCH SPORTS?

Posed to all respondents.



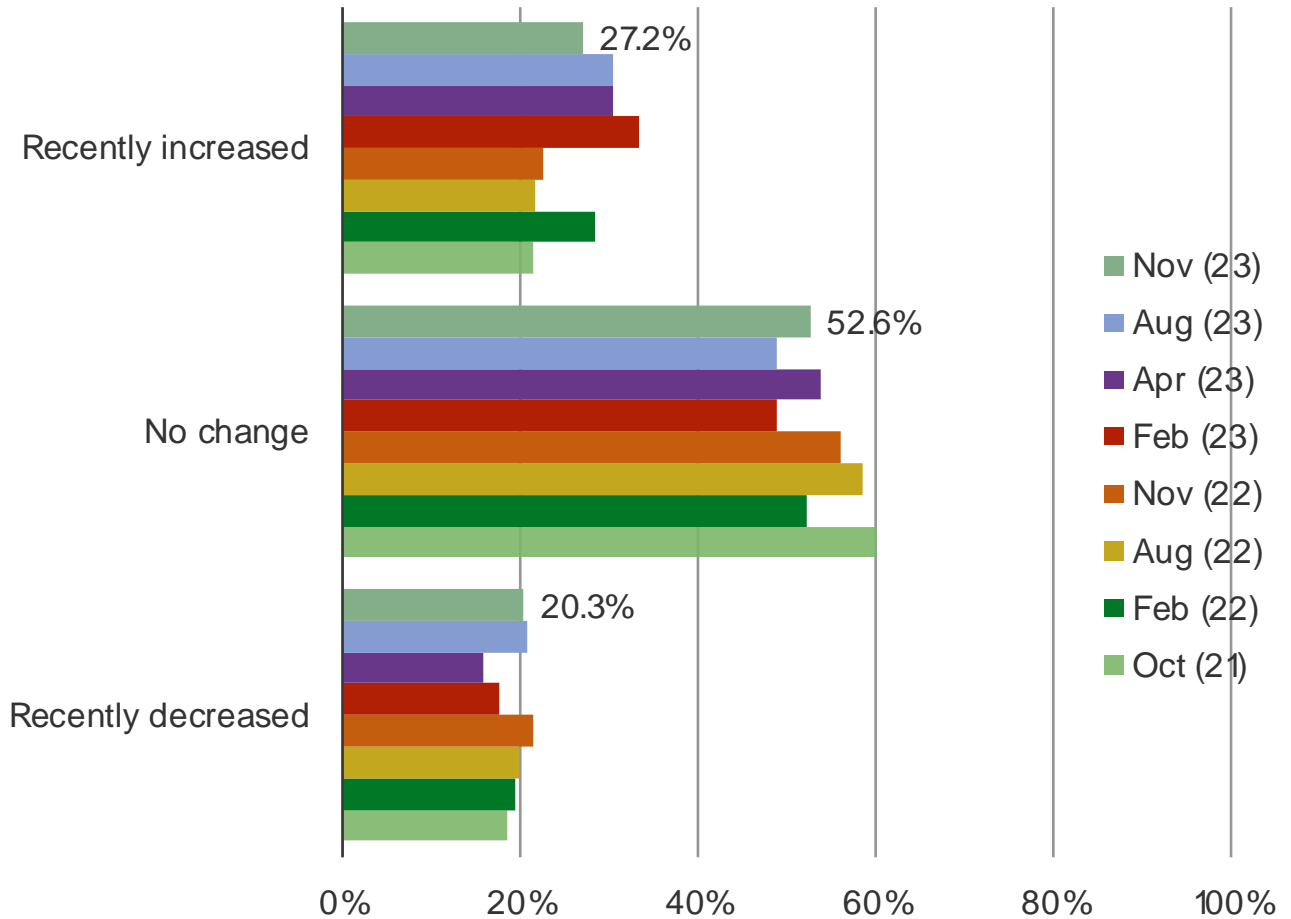
DO YOU EVER GAMBLE ON SPORTS?

Posed to all respondents.



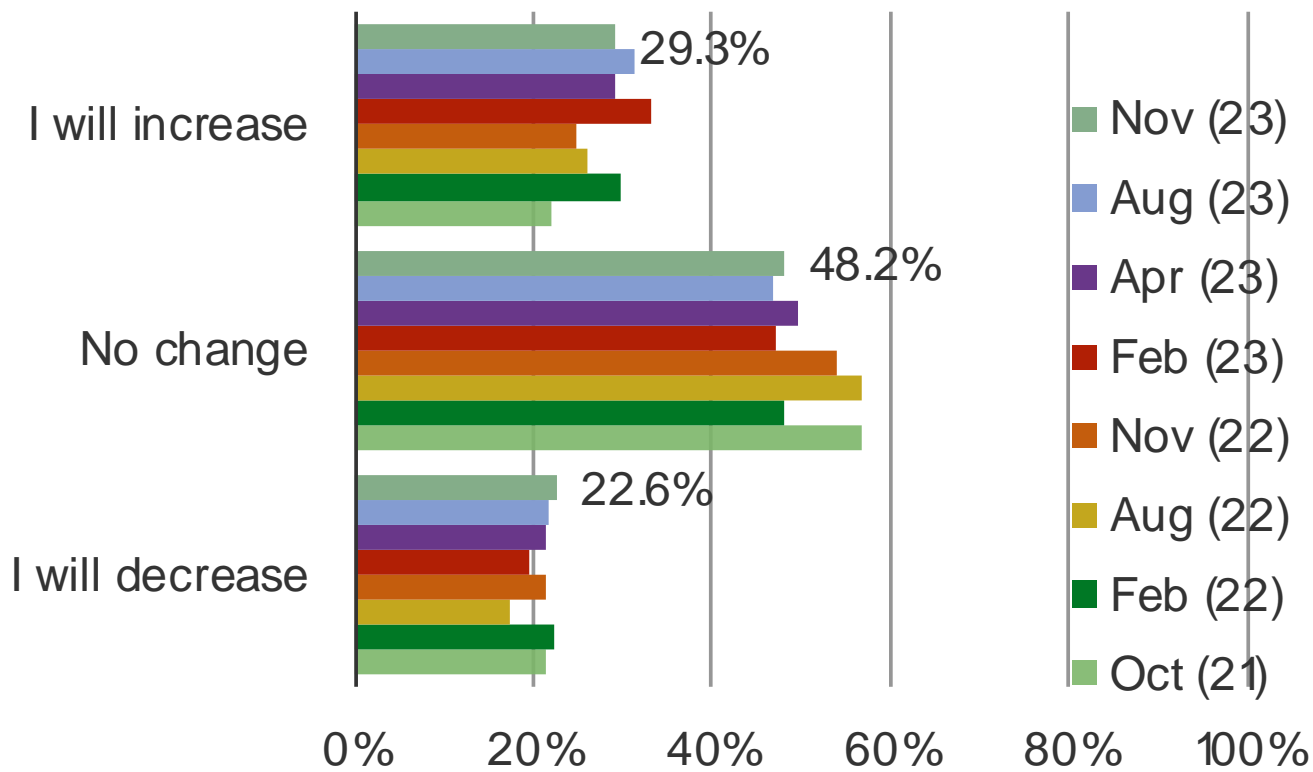
HAVE YOU RECENTLY CHANGED HOW OFTEN YOU GAMBLE ON SPORTS?

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



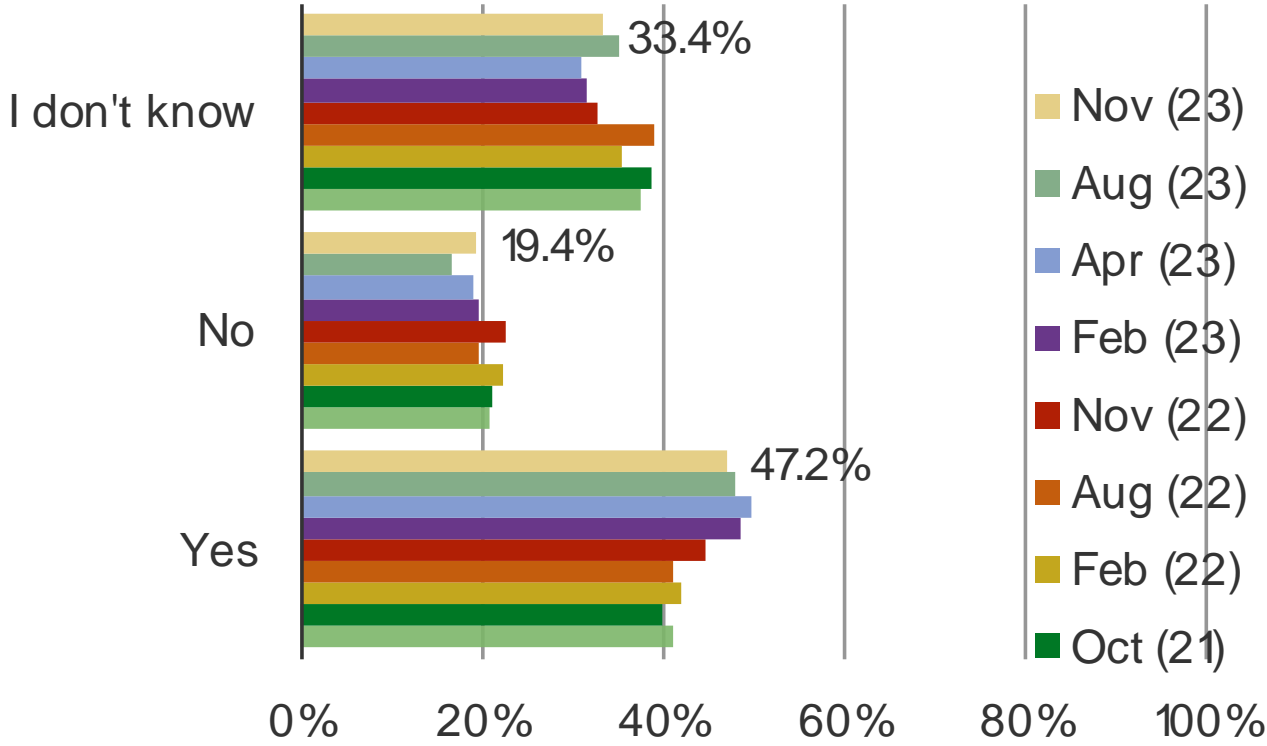
GOING FORWARD, DO YOU EXPECT THAT YOU WILL INCREASE OR DECREASE HOW OFTEN YOU GAMBLE ON SPORTS?

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



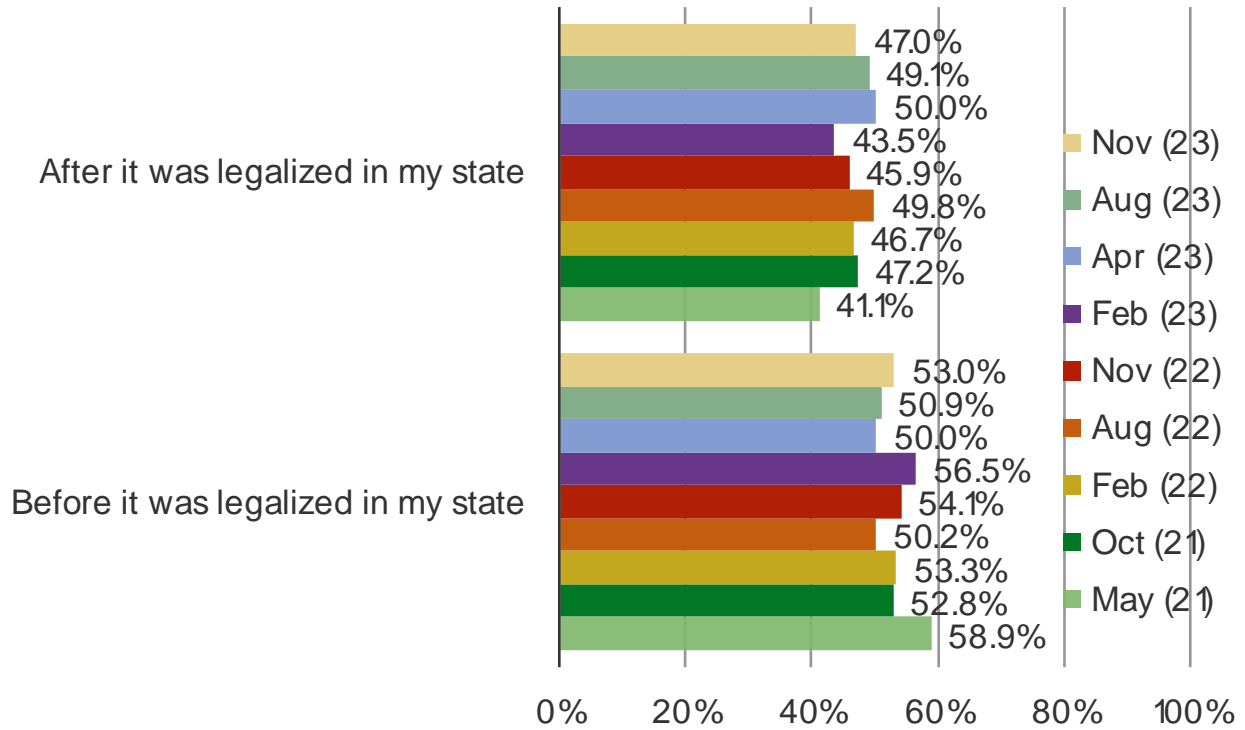
IS GAMBLING ON SPORTS LEGAL IN THE STATE THAT YOU LIVE IN?

Posed to all respondents.



WHEN DID YOU START GAMBLING ON SPORTS?

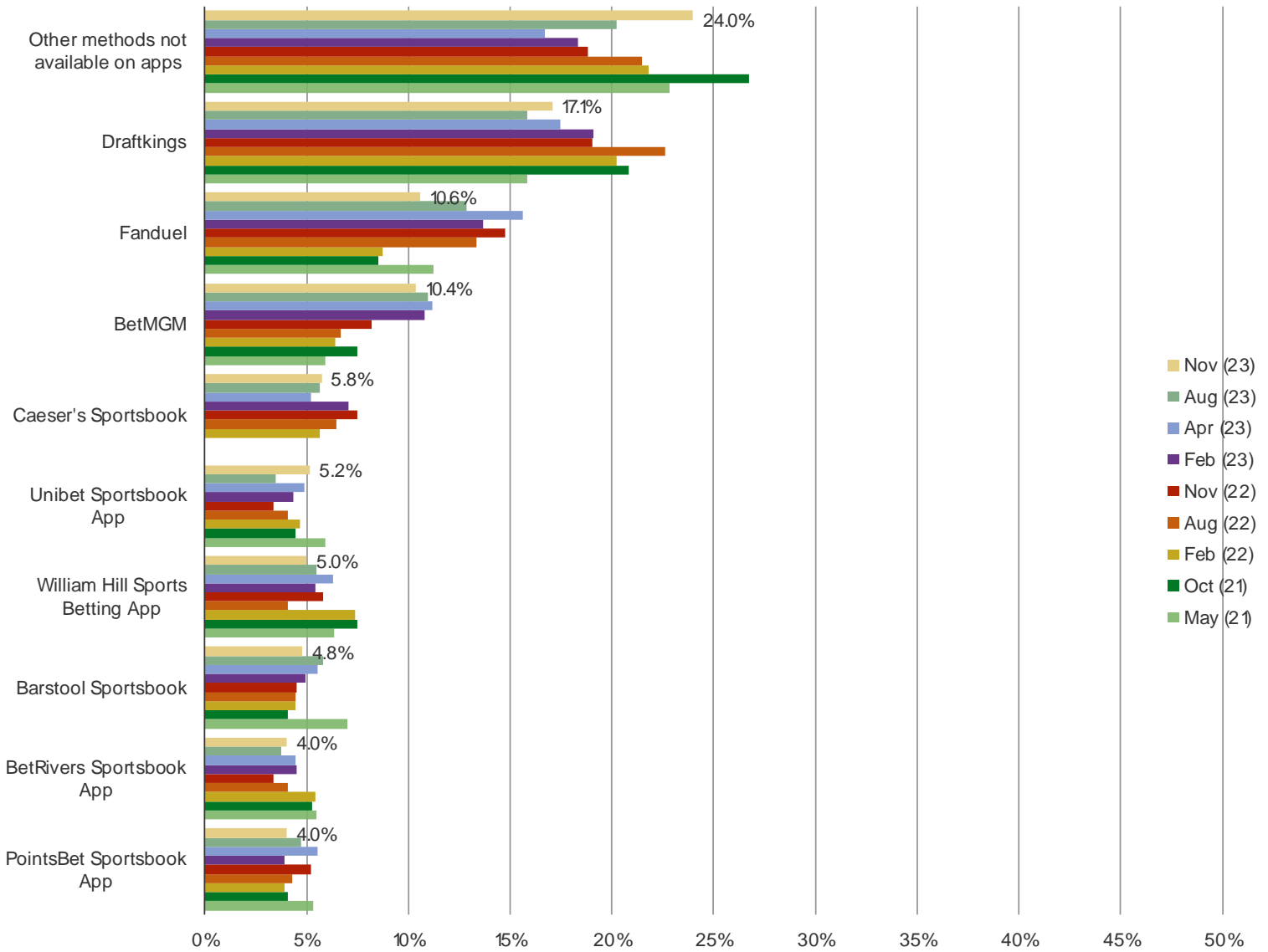
Posed to all respondents who gamble on sports more often than never.





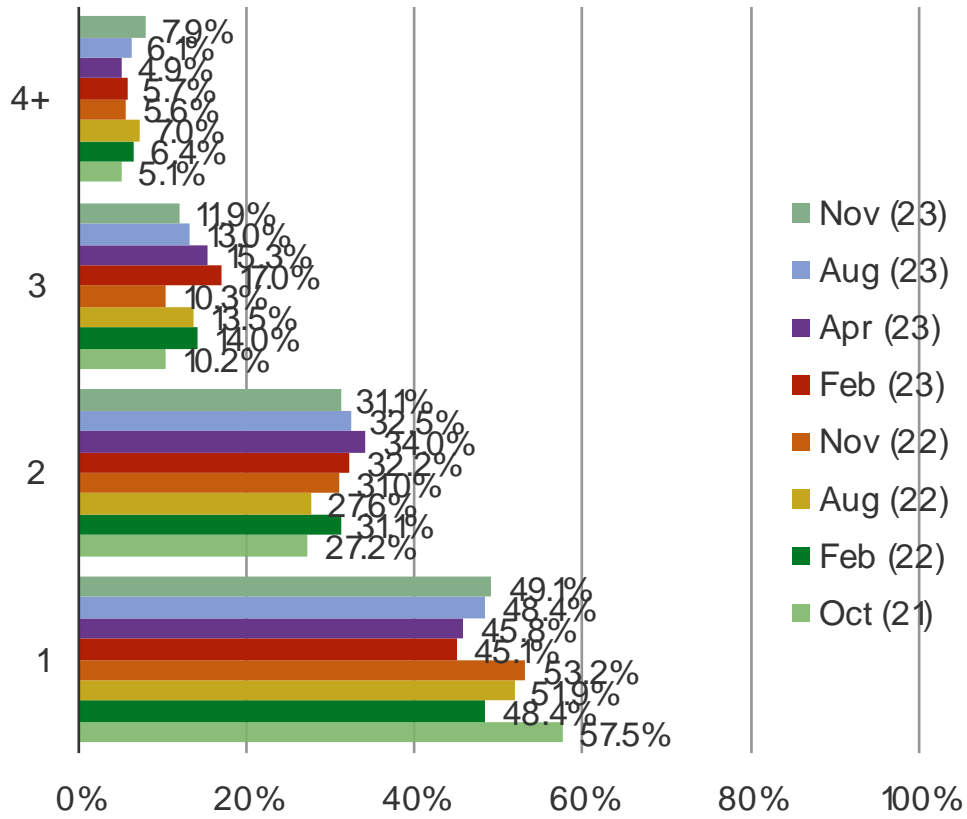
WHICH IS YOUR PREFERENCE FOR GAMBLING ON SPORTS?

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



HOW MANY SPORTS GAMBLING APPS DO YOU USE?

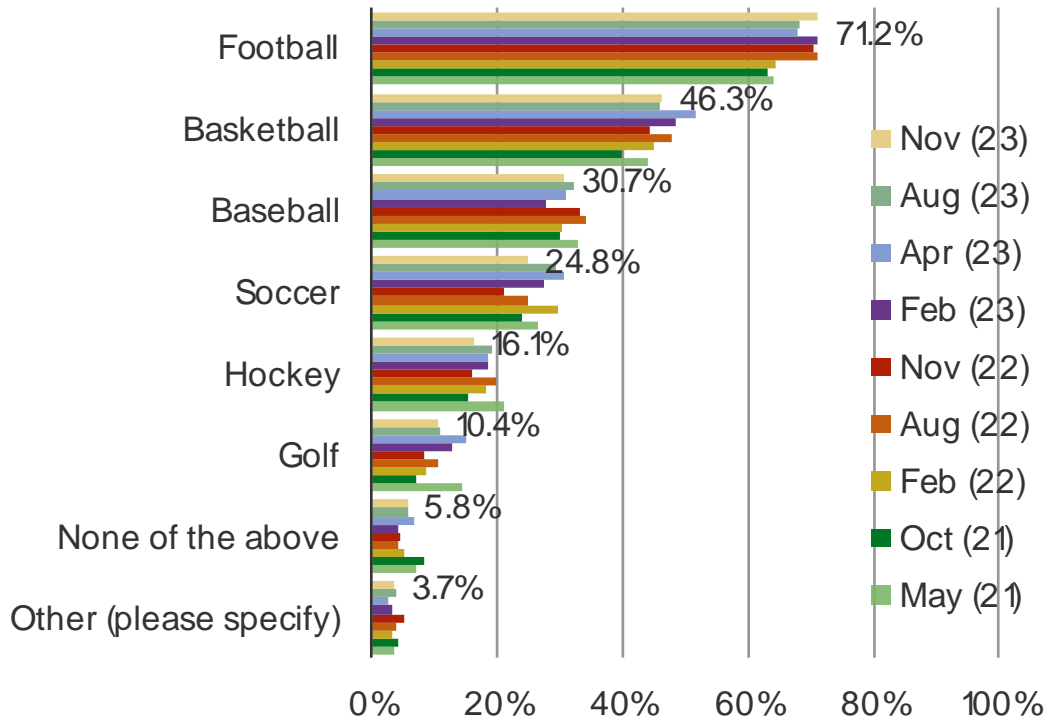
Posed to all respondents who gamble on sports more often than never.



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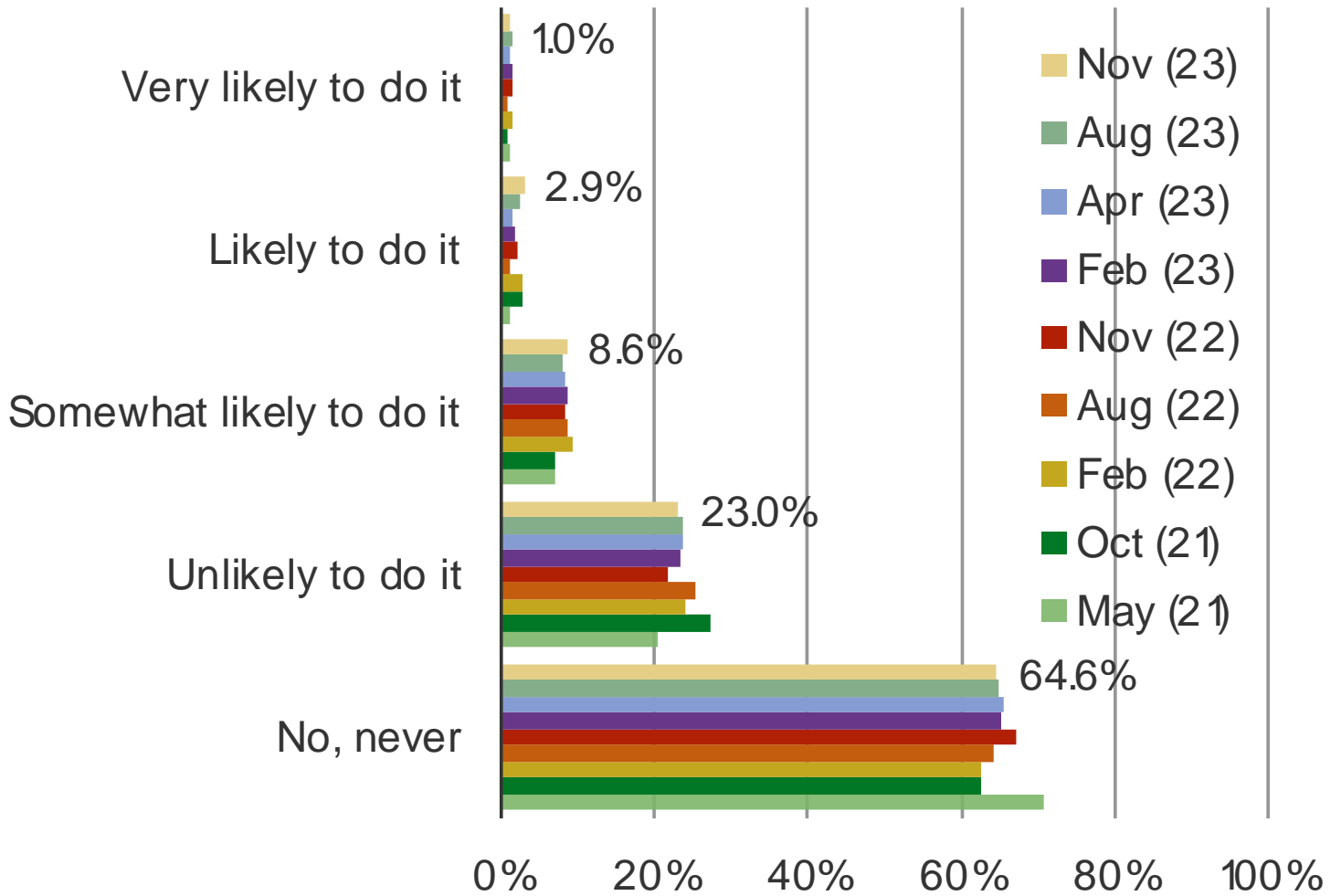
WHAT SPORTS DO YOU GAMBLE ON? (SELECT ALL THAT APPLY)

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



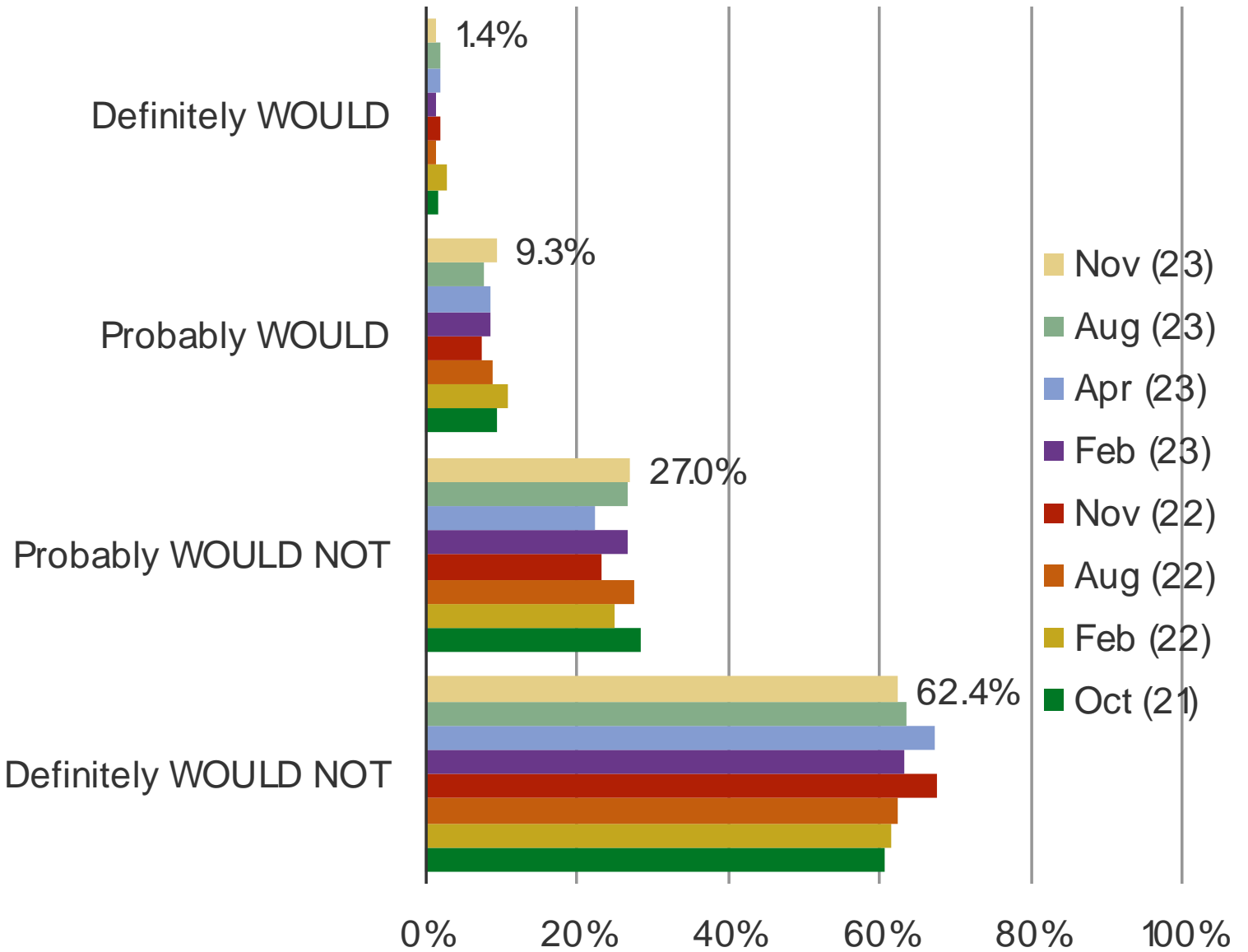
WOULD YOU CONSIDER GAMBLING ON SPORTS IN THE FUTURE?

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



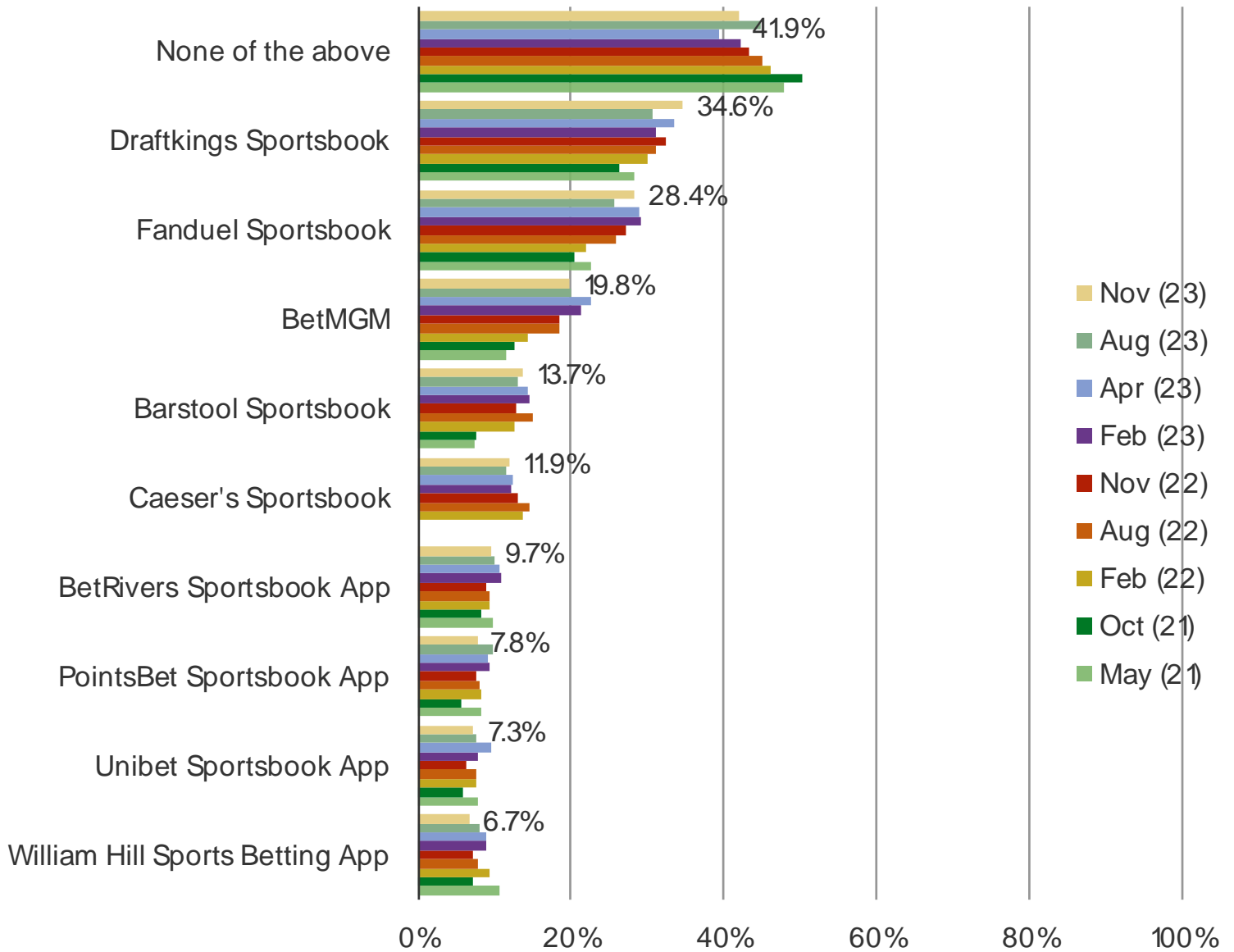
IF SPORTS GAMBLING BECAME LEGAL IN YOUR STATE, WOULD YOU BE INTERESTED IN GAMBLING ON SPORTS?

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.



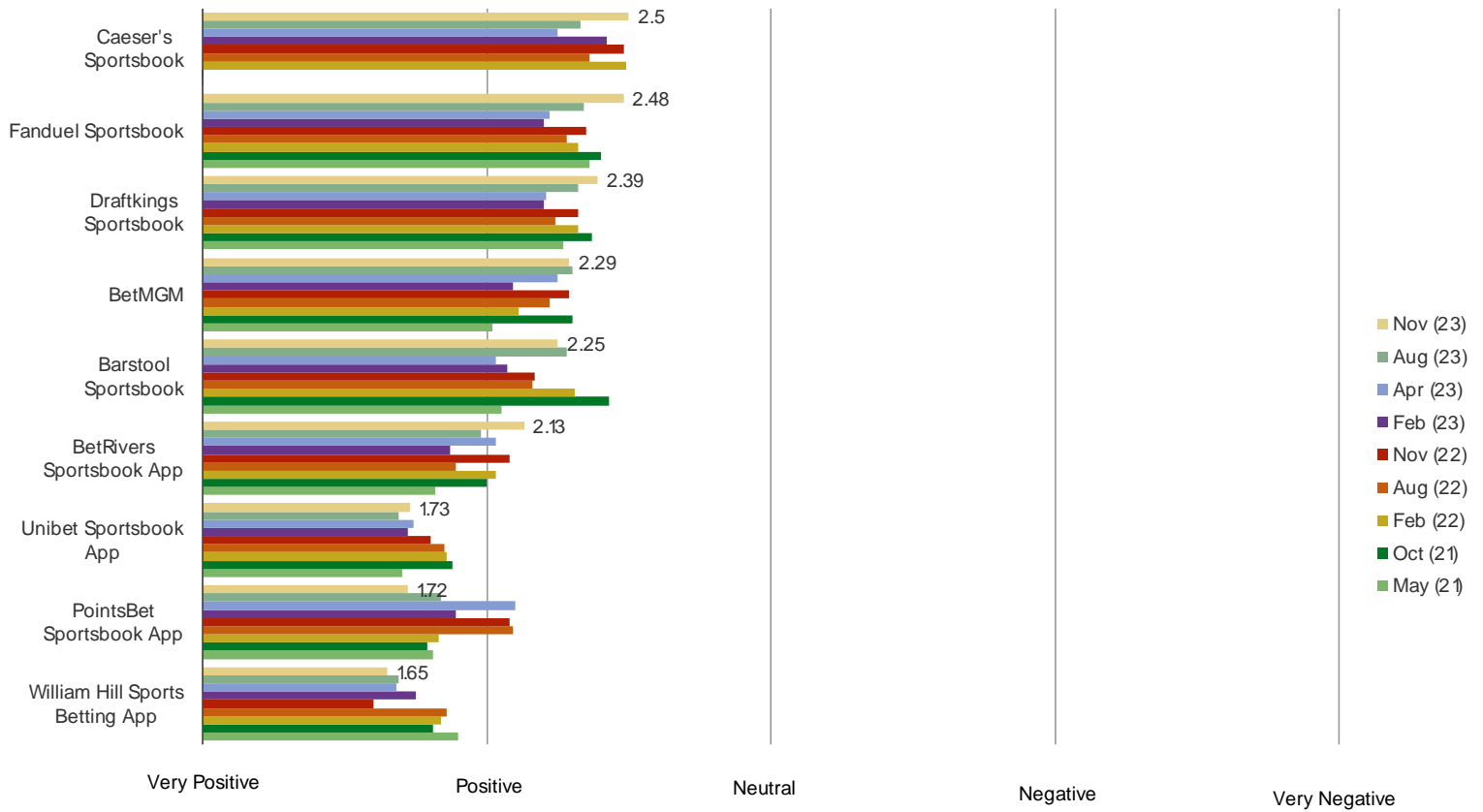
ARE YOU FAMILIAR WITH ANY OF THE FOLLOWING SITES/APPS?

Posed to all respondents.



WHAT IS YOUR OPINION OF THE FOLLOWING?

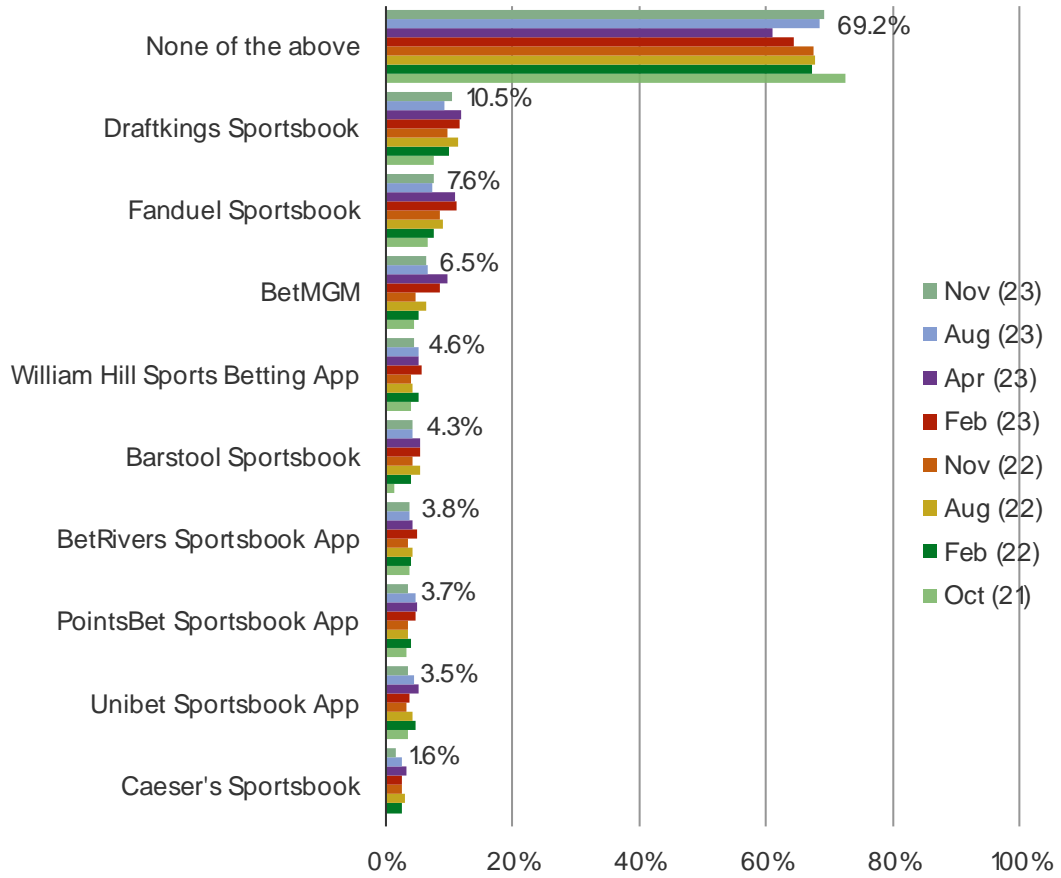
Posed to respondents who are familiar with each of the following...



	N =
Draftkings Sportsbook	433
Fanduel Sportsbook	355
BetMGM	248
William Hill Sports Betting App	84
FOX Bet Sportsbook App	165
PointsBet Sportsbook App	97
Unibet Sportsbook App	91
BetRivers Sportsbook App	121
Barstool Sportsbook	172
Caeser's Sportsbook	149

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	PointsBet Sportsbook App	Unibet Sportsbook App	BetRivers Sportsbook App	Barstool Sportsbook	Caeser's Sportsbook	N=
Draftkings Sportsbook		26.9%	14.8%	14.8%	8.7%	4.7%	11.4%	8.7%	4.7%	149
Fanduel Sportsbook	40.0%		14.0%	12.0%	9.0%	9.0%	11.0%	9.0%	5.0%	100
BetMGM	24.4%	15.6%		12.2%	15.6%	13.3%	13.3%	12.2%	8.9%	90
William Hill Sports Betting App	34.4%	18.8%	17.2%		18.8%	10.9%	14.1%	20.3%	4.7%	64
FOX Bet Sportsbook App	27.9%	9.3%	14.0%	22.1%		16.3%	11.6%	16.3%	4.7%	86
PointsBet Sportsbook App	25.5%	17.7%	27.5%	23.5%		11.8%	17.7%	23.5%	5.9%	51
Unibet Sportsbook App	14.6%	18.8%	25.0%	14.6%	12.5%		18.8%	4.2%	8.3%	48
BetRivers Sportsbook App	33.3%	21.6%	23.5%	17.7%	17.7%	17.7%		21.6%	11.8%	51
Barstool Sportsbook	22.4%	15.5%	19.0%	22.4%	20.7%	3.5%	19.0%		3.5%	58
Caeser's Sportsbook	30.4%	21.7%	34.8%	13.0%	13.0%	17.4%	26.1%	8.7%		23



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

Posed to all respondents.

