



ASU GSI Q1 National Sports Public Opinion Pulse Update

January 2022

Project Objectives

Identify

- General perception and awareness around sports betting in the US
- Identify the sentiment and attitudes of the general public towards sports betting and understand the cultural change, social change, and acceptance of sports betting
- The driving forces behind the acceptance of sports betting



Discover

- Overall sentiment and perceptions of sports betting among general population and sports fans/ spectators
- Key takeaways that explain the current environment around sports betting



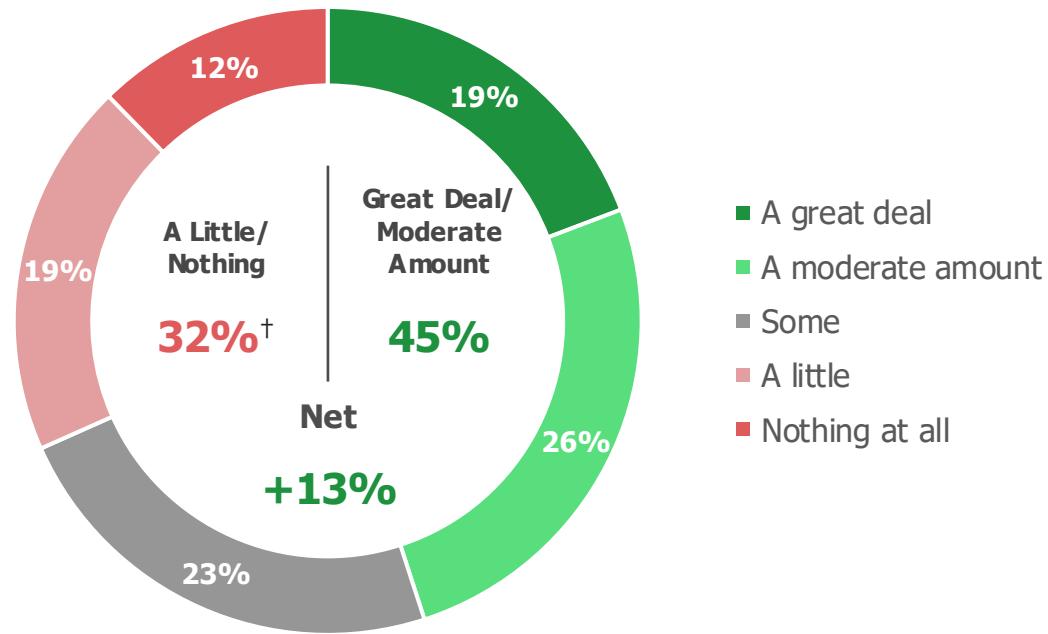
Setting the Stage

Identify the general awareness of sports betting and sources of information

Most Americans have heard at least a little about sports betting

- Awareness of sports betting is highest in the Atlantic region and lowest in the Pacific region
 - Atlantic: 54% Great Deal/Moderate Amount
 - Western: 49%
 - Great Lakes: 46%
 - Southern: 43%
 - Plains: 41%
 - Pacific: 38%

Awareness of Sports Betting



Q) How much have you seen or heard regarding sports betting in the United States? (n=2400)

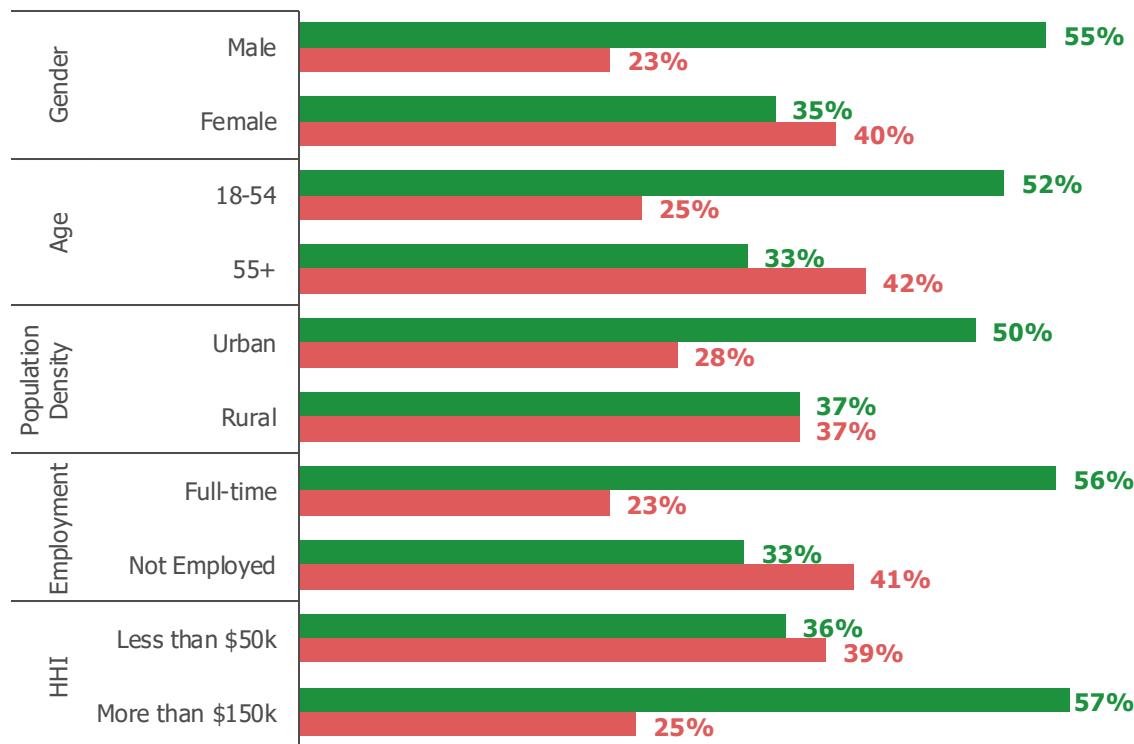
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Those most aware tend to be younger men with higher incomes

- Except for the regional differences, awareness of sports betting follows similar trends as interest in sports in general.
- High (great deal/moderate amount) awareness by Race/Ethnicity:
 - Hispanic/Latino: 51%
 - African American: 46%
 - White, non-Hispanic: 44%
 - Asian: 41%

Awareness of Sports Betting

■ A great deal/A moderate amount ■ A little/Nothing at all

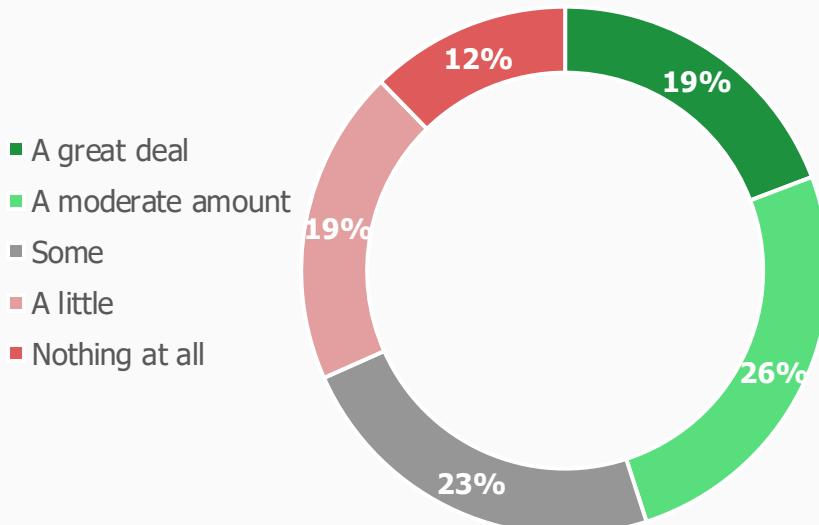


Q) How much have you seen or heard regarding sports betting in the United States? (n=2400)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

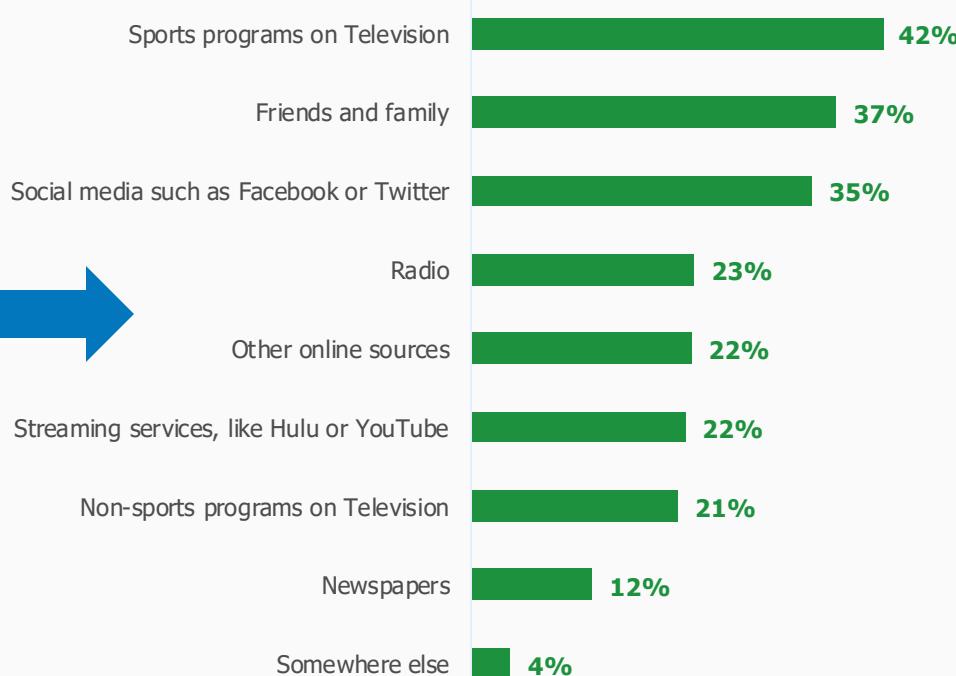
Many people have learned about sports betting through television or word of mouth

Awareness of sports betting



- A great deal
- A moderate amount
- Some
- A little
- Nothing at all

Source of information



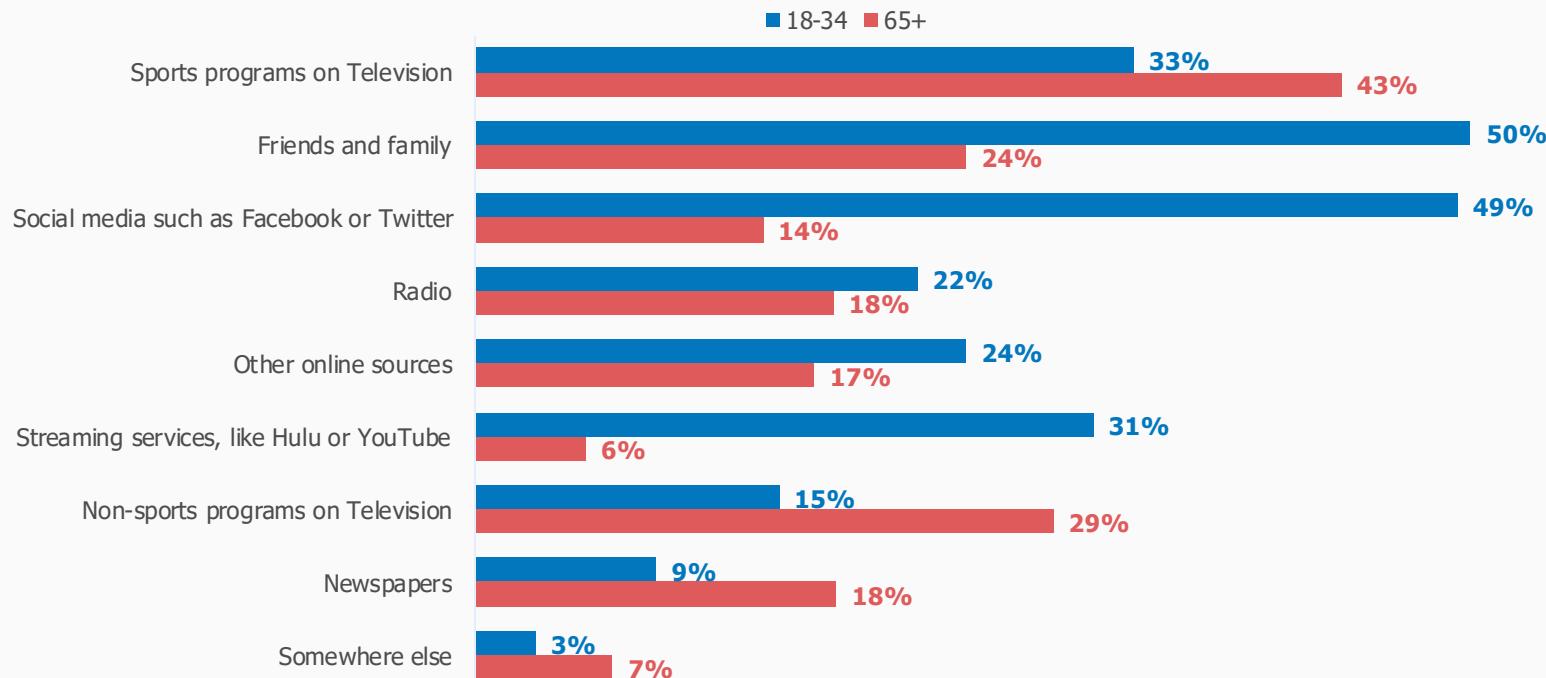
Q) How much have you seen or heard regarding sports betting in the United States? (n=2400)

Q) From which of the following places have you heard or learned about sports betting? Select all that apply. (n=2105 respondents who had heard at least a little about sports betting)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Sources of sports betting news differ by age

Source of Information by Age



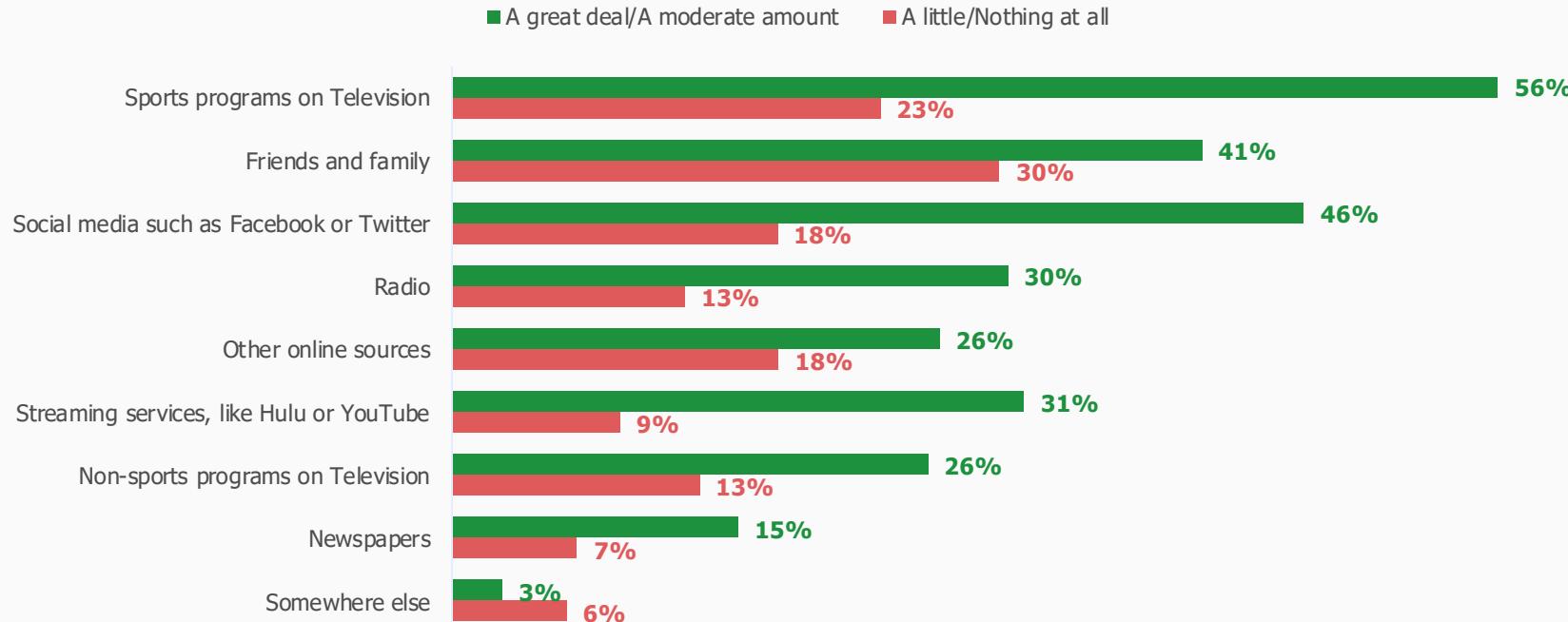
Q) From which of the following places have you heard or learned about sports betting? Select all that apply. (n=2105)

Subgroup: 18-34 (n=648), 65+ (n=427)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

People who have heard the most about sports betting use Television as a media source while people who have heard less heard from friends and family

Source of Information by Awareness of Sports Betting



Q) How much have you seen or heard regarding sports betting in the United States? (n=2400)

Q) From which of the following places have you heard or learned about sports betting? Select all that apply.

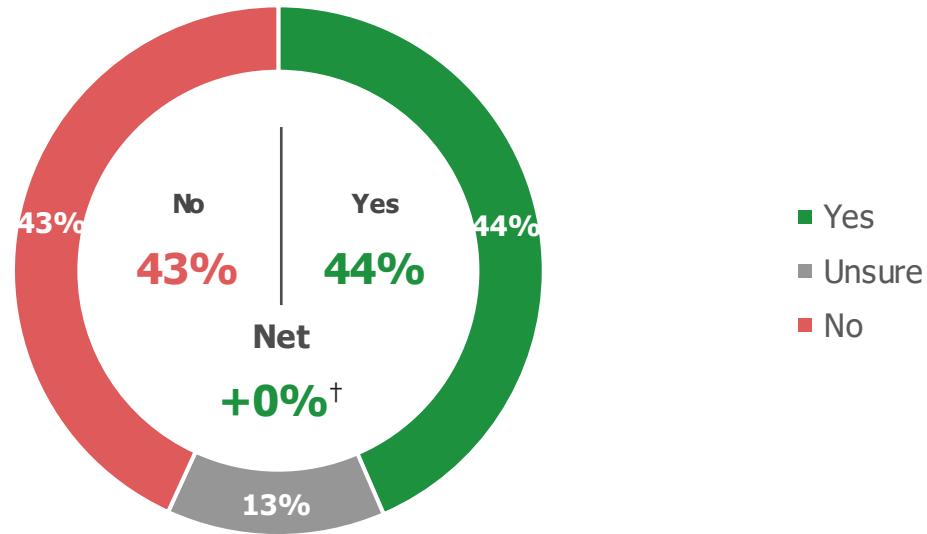
Subgroup: A great deal/A moderate amount (n=1080), A little/Nothing at all (n=465)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

44% of respondents have seen sports betting advertisements

- Demographics that are more likely to have seen advertisements:
 - Atlantic region (57%)
 - Males (55%)
 - Ages 35-44 (51%)
 - Western region (51%)
 - African Americans (47%)
- Demographics that are less likely to have seen advertisements:
 - Females (51%)
 - Pacific region (56%)
 - Asians (53%)
 - High school or less (48%)

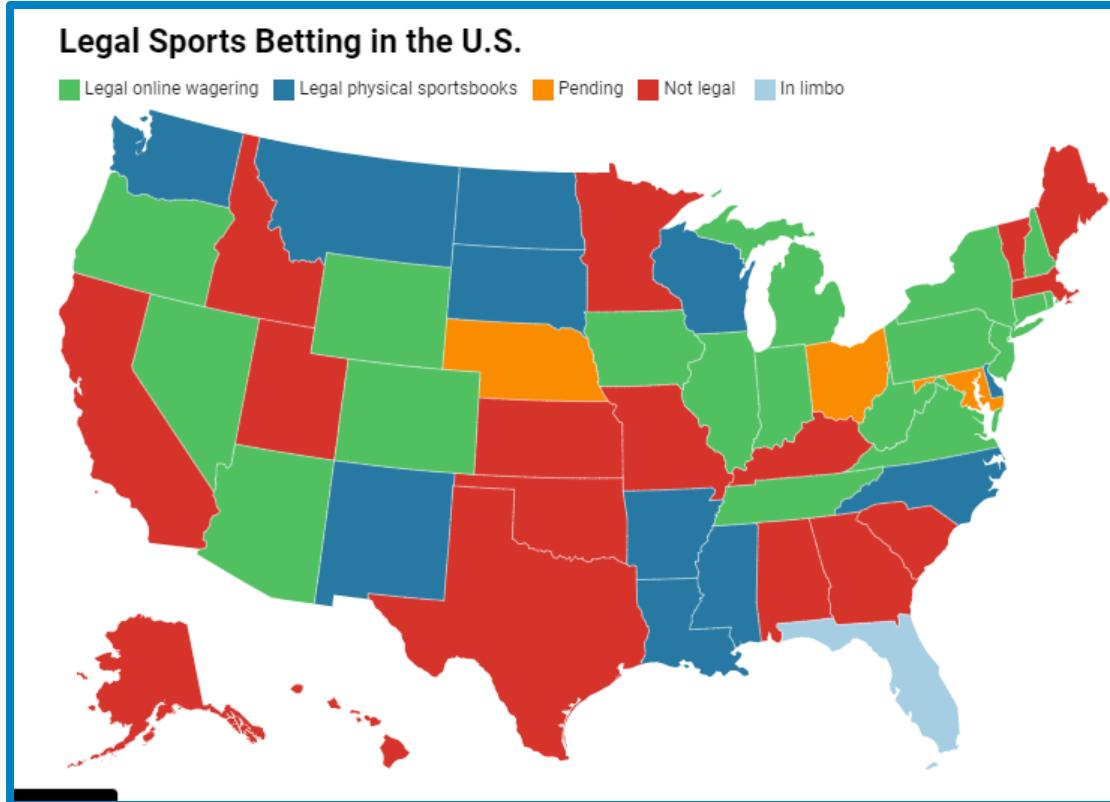
Recently, have you seen advertisements on television or elsewhere promoting specific sports betting platforms?



Q) Recently, have you seen advertisements on television or elsewhere promoting specific sports betting platforms? (n=2400)

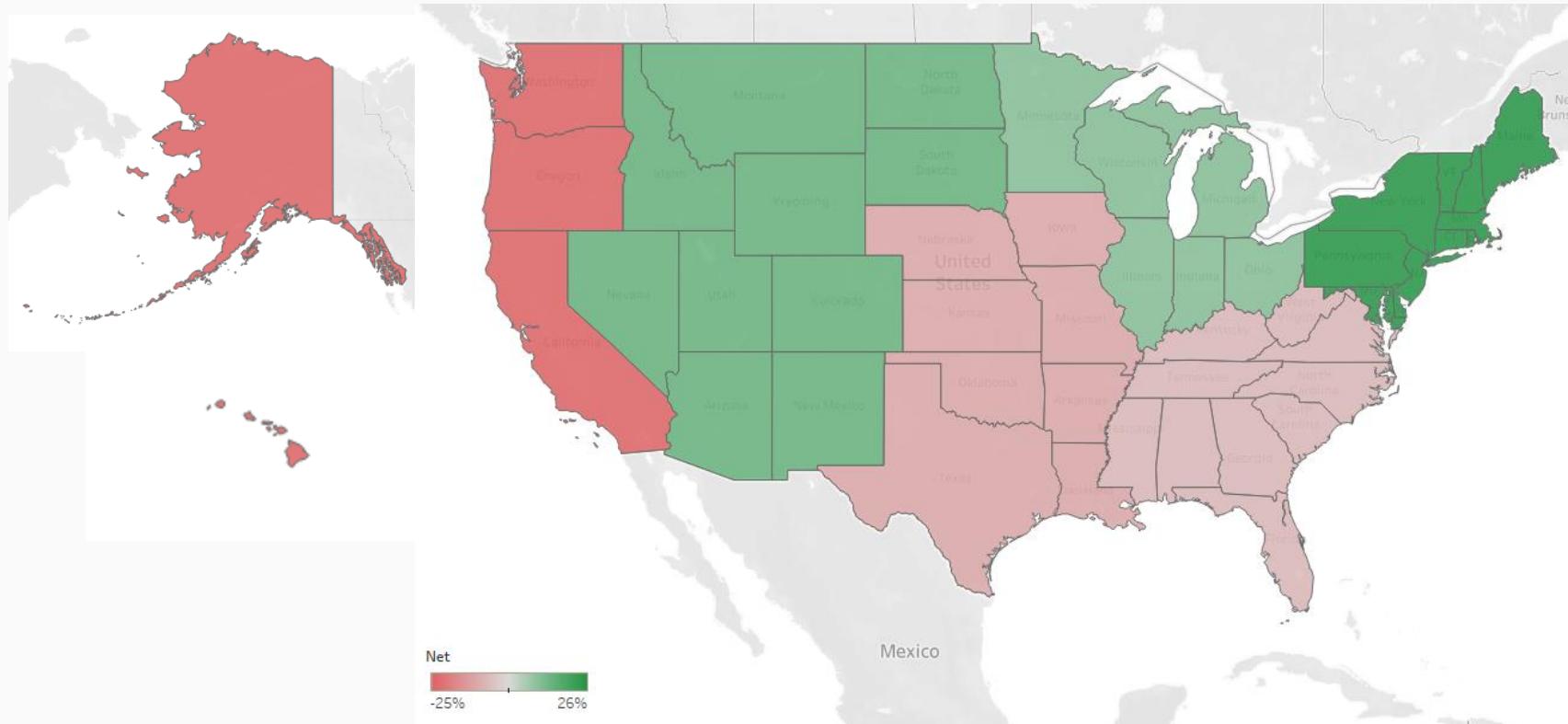
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All numbers are correct.

Current status of sports betting in the US



Source: "Where is Sports Betting Legal? A Guide to all 50 States." Forbes.
Date Accessed: 1/24/2022

Regions where sports betting is legal report seeing advertisements more frequently



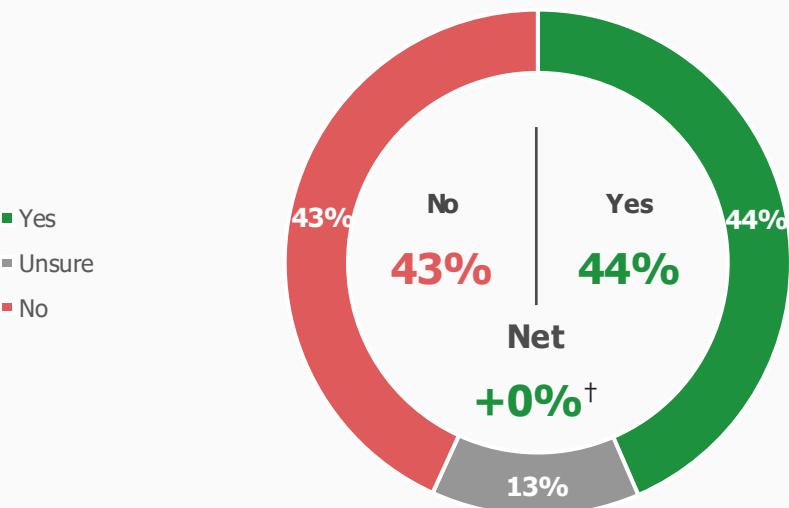
Q) Recently, have you seen advertisements on television or elsewhere promoting specific sports betting platforms?

Subgroup: Southern (n=569), Pacific (n=391), Western (n=192), Plains (n=389), Atlantic (n=475), Great Lakes (n=384)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

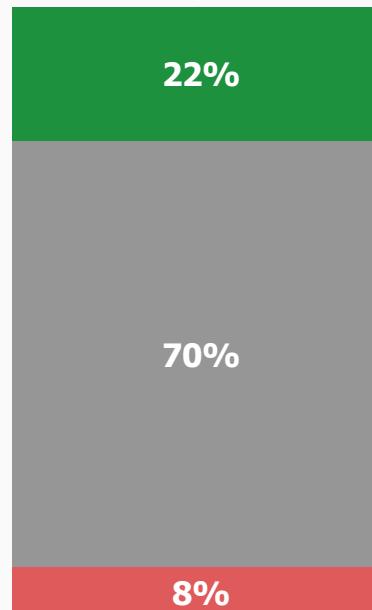
Seeing an ad slightly increases Americans' likelihood to bet

Recently, have you seen advertisements on television or elsewhere promoting specific sports betting platforms?



Impact of Ad on Likelihood to Bet

■ Less likely to bet ■ No effect/Unsure ■ More likely to bet



- Males (67%)
- Ages 18-44 (70%)
- Urban (38%)
- Plains region (22%)
- Hispanic/Latinos (28%)
- Bet on sports at least once per month (73%)
- Ages 55+ (46%)
- Rural (22%)
- White, non-Hispanics (70%)
- Non sports bettors (60%)
- Great Lakes region (21%)

Q) Recently, have you seen advertisements on television or elsewhere promoting specific sports betting platforms? (n=2400)
Q) Has seeing advertisements promoting sports betting platforms impacted your likelihood to bet on sports? (n=1044)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

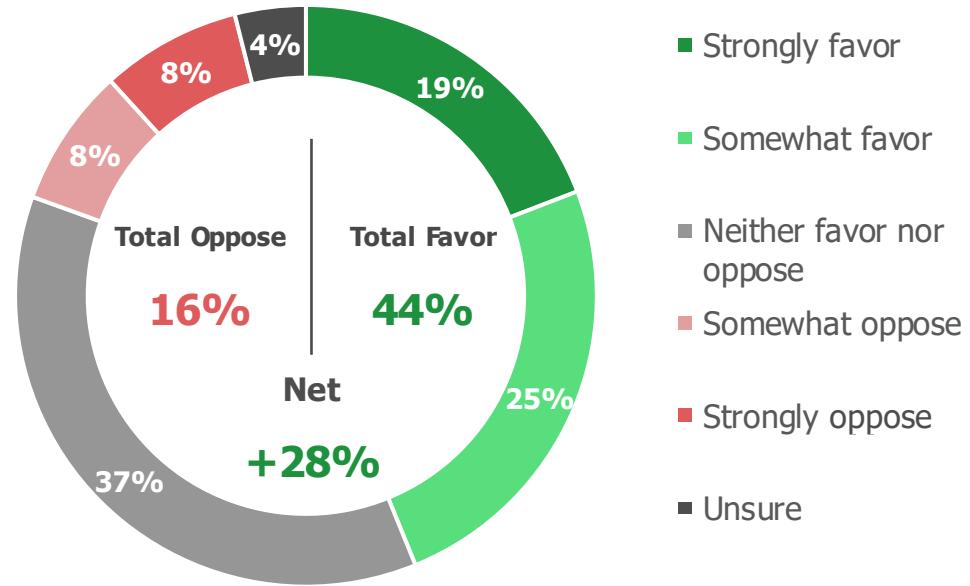
Identify

Identify the sentiment and attitudes of the general public towards sports betting and understand the cultural change, social change, and acceptance of sports betting

Americans generally favor sports betting, but many are ambivalent

- Demographics that are more in favor of sports betting:
 - Males (54%)
 - Ages 35-54 (54%)
 - Atlantic region (49%)
 - Hispanic/Latinos (49%)
- Demographics that are more oppose:
 - Males aged 65+ (31%)
 - Postgraduates (21%)
 - Conservatives (21%)

Opinion of Sports Betting



Q) As you may know, recently, the United States Supreme Court allowed states to legalize sports betting. Regardless of whether you personally would participate in sports betting, do you favor or oppose allowing adults in the United States to bet on sporting events? (n=2400)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Persona: Supporters of Sports Betting

Opinion of Sports Betting

■ Strongly favor ■ Somewhat favor ■ Neither favor nor oppose ■ Somewhat oppose ■ Strongly oppose ■ Unsure



Male
(59%)

Ages 35-54
(40%)

HHI \$50k+
(66%)



Often attend
sporting events
in-person (32%)



Often watch sports
on broadcast TV
(72%)

Gamble on things other
than sports at least once
per year (57%)

Bet on sports at least
once per month (38%)

Not
racially/ethnically
different to U.S. as
a whole

Persona: Wait and See

Opinion of Sports Betting

■ Strongly favor ■ Somewhat favor ■ Neither favor nor oppose ■ Somewhat oppose ■ Strongly Oppose ■ Unsure



Female
(63%)

HHI less than
\$50k (46%)

Not
racially/ethnically
different to U.S. as
a whole



Do not attend
sporting events in-
person often (52%)
or at all (35%)

Never gamble on
things other than
sports (50%)

Never bet on sports
(79%)

Do not watch sports
on broadcast TV often
(27%) or at all (31%)

Persona: Opponents of Sports Betting

Opinion of Sports Betting

■ Strongly favor ■ Somewhat favor ■ Neither favor nor oppose ■ Somewhat oppose ■ Strongly Oppose ■ Unsure



Live in rural area (26%)

Ages 55+ (58%)

White, non-Hispanic (68%)

Conservative (40%)



Do not watch sports on broadcast TV often (30%) or at all (26%)

Never gamble on things other than sports (64%)

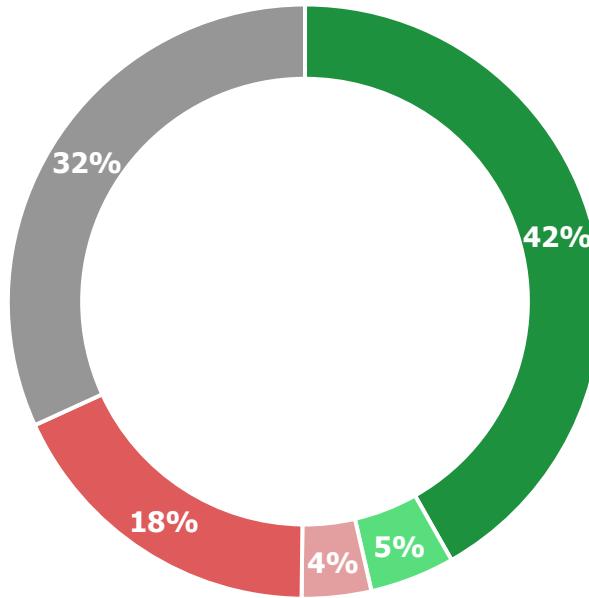
Never bet on sports (88%)

Do not attend sporting events in-person often (53%) or at all (33%)

Few people say their minds have changed on sports betting

- Demographics that favor sports betting now and in the past:
 - Males (52%)
 - Ages 35-54 (52%)
 - Urban residents (48%)
 - Hispanic/Latinos (47%)
- Demographics that oppose sports betting now and in the past:
 - Males ages 65+ (36%)
 - Conservatives (23%)
 - Asians (22%)

Change in Opinion of Sports Betting



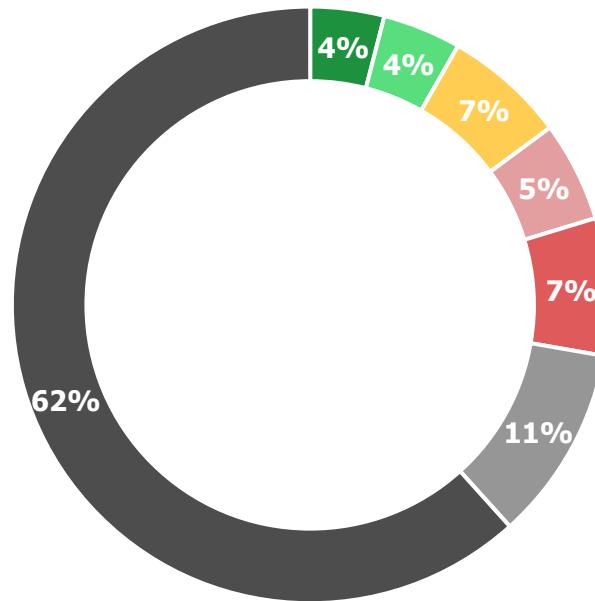
- I favored sports betting in the past, and I favor it now
- I opposed sports betting in the past, and I favor it now
- I favored sports betting in the past, and I oppose it now
- I opposed sports betting in the past, and I oppose it now
- Unsure

Q) As sports betting has become more prevalent, have your opinions on the subject changed? (n=2400)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

Most Americans do not bet on sports

- Despite a plurality of the public having heard a great deal or moderate amount of sports betting (45%) and favor allowing US adults to bet on sports (44%), relatively few adults bet on sports on a regular basis.
- 50% of those in favor of sports betting bet on sports less often than once per year or don't bet at all

Sports Betting Frequency



Q) How often do you bet on sporting events, if at all? (n=2400)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

Persona: Frequent Bettors (Several times/Once per week/Several times per month)

Sports Betting Frequency

■ Monthly ■ Less than Monthly ■ I never bet on sporting events

15%

23%

62%

Male (68%)

Atlantic region
(28%)

Ages 18-44
(70%)

Hispanic
(23%)

HHI \$100k+
(35%)

Often attend
sporting events
in-person (57%)

Favorable of NFL
(91%), MLB (81%),
NCAA (79%), and NBA
(78%)

Often watch sports
on broadcast TV
(90%)



Q) How often do you bet on sporting events, if at all? (n=357 Frequent Bettors)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Persona: Casual Bettors (Once a month/once per year/Less often)

Sports Betting Frequency

■ Monthly ■ Less than Monthly ■ I never bet on sporting events



15%

23%

62%

Male (55%)

Ages 35-54
(39%)

HHI \$50k+
(65%)

Do not often attend
sporting events in-
person (66%)

Often watch sports
on broadcast TV
(71%)

Will gamble on others,
but only once a year or
less (63%)

Favorable of NFL
(77%), MLB (72%),
NCAA (61%), and NBA
(60%)

Not racially/ethnically
different to U.S. as a
whole

Persona: Non-Bettors

Sports Betting Frequency

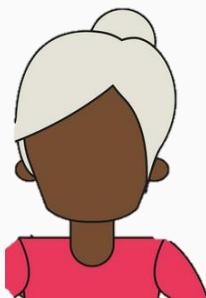
■ Monthly ■ Less than Monthly ■ I never bet on sporting events



Female (58%)

Ages 65+ (28%)

Southern region (27%)



HHI <\$50k (45%)

Not racially/ethnically different to U.S. as a whole

Never gamble on others (58%)

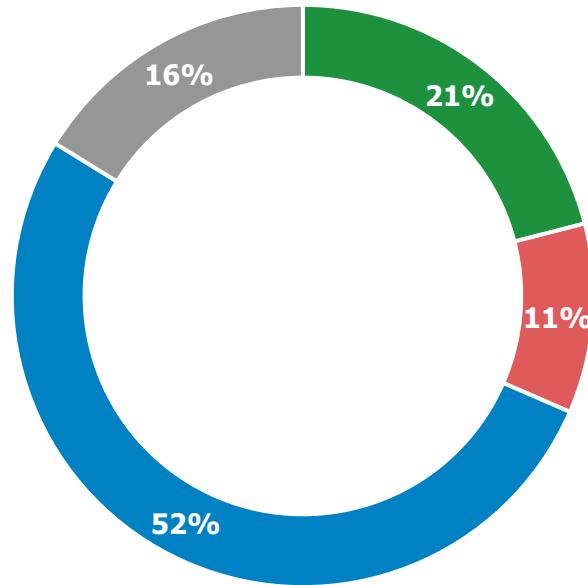
Do not watch sports on broadcast TV often (28%) or at all (30%)

Do not attend sporting events in-person often (53%) or at all (36%)

Most feel that states should be given an option whether to legalize sports betting

- Demographics that are more in support of legalizing in all states:
 - Males (27%)
 - Ages 35-44 (29%)
 - Hispanic/Latinos (24%)
 - Plains region (24%)
- Demographics that are more in support of prohibiting in all states:
 - Ages 55+ (15%)
 - Postgraduates (15%)
 - Conservatives (14%)

Perceptions of State Autonomy on Sports Betting



- All states should legalize sports betting
- All states should prohibit sports betting
- States should decide for themselves whether to legalize or prohibit sports betting
- Unsure

Q) As you may know, some states have legalized sports betting, while some states have not. Which of the following statements comes closest to your opinion, even if none are exactly correct? (n=2400)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

Perceptions of state autonomy on sports betting by region and age

	All should legalize	All should prohibit	States should decide for themselves	Unsure
Southern	20%	11%	55%	14%
Pacific	16%	10%	53%	<u>21%</u>
Western	18%	9%	<u>61%</u>	12%
Plains	<u>24%</u>	13%	50%	13%
Atlantic	23%	10%	48%	<u>19%</u>
Great Lakes	23%	10%	50%	<u>17%</u>

	All should legalize	All should prohibit	States should decide for themselves	Unsure
18-34	23%	8%	48%	<u>21%</u>
35-44	<u>29%</u>	7%	48%	15%
45-54	<u>26%</u>	10%	52%	13%
55-64	16%	<u>14%</u>	55%	15%
65+	11%	<u>15%</u>	<u>60%</u>	14%

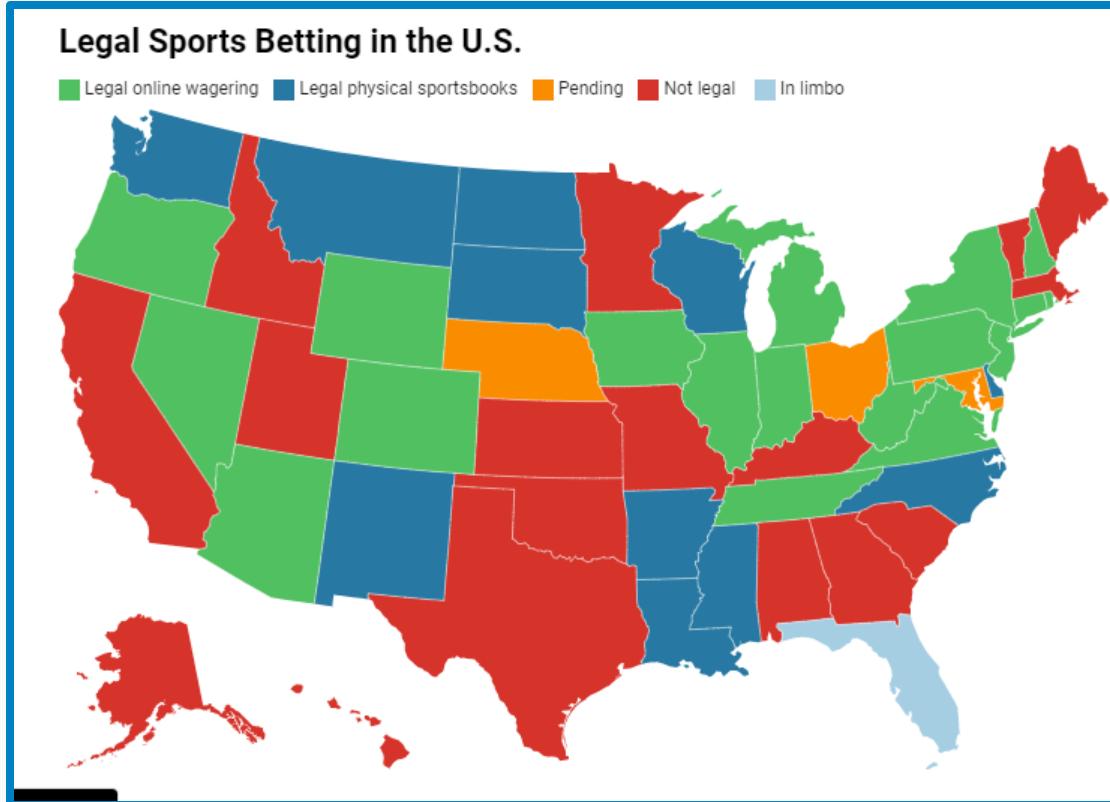
Q) As you may know, some states have legalized sports betting, while some states have not. Which of the following statements comes closest to your opinion, even if none are exactly correct?

Subgroup: Southern (n=569), Pacific (n=391), Western (n=192), Plains (n=389), Atlantic (n=475), Great Lakes (n=384)

18-34 (n=715), 35-44 (n=394), 45-54 (n=384), 55-64 (n=398), 65+ (n=509)

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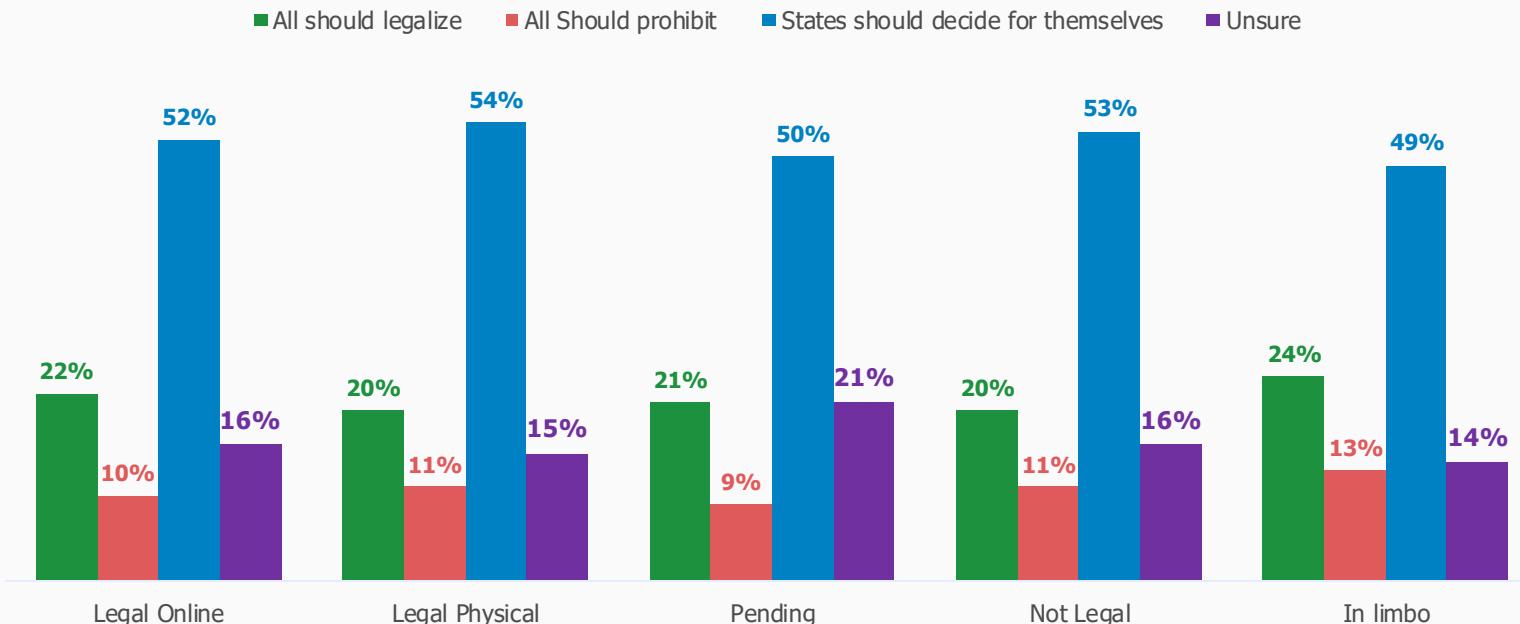
Refresher: Current status of sports betting in the US



Source: "Where is Sports Betting Legal? A Guide to all 50 States." Forbes.
Date Accessed: 1/24/2022

Whether a person lives in a state where sports betting is legal does not affect their opinion on whether *all* states should legalize sports betting

Perceptions of State Autonomy on Sports Betting by Legal Status



Q) As you may know, some states have legalized sports betting, while some states have not. Which of the following statements comes closest to your opinion, even if none are exactly correct?

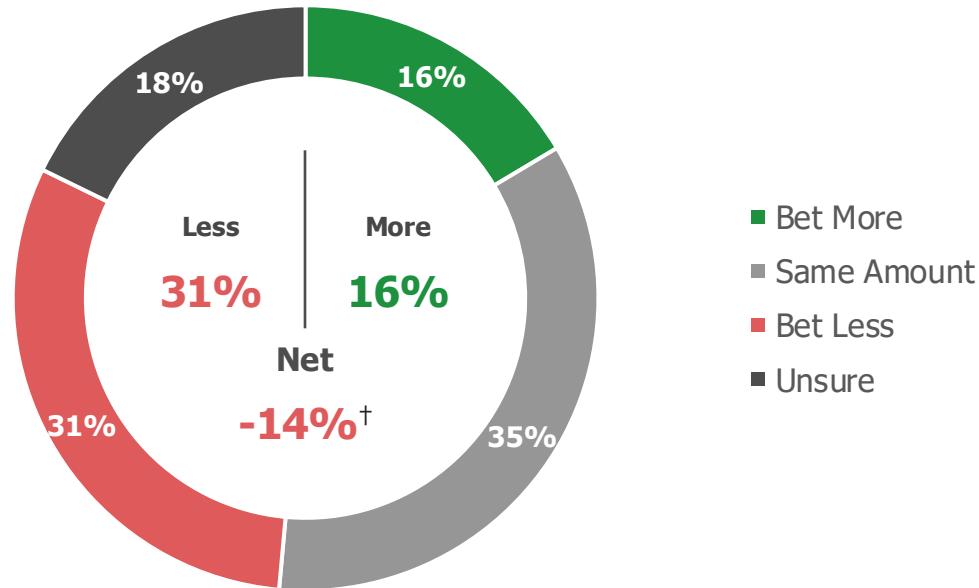
Subgroup: Legal Online (n=855), Legal Physical (n=306), Pending (n=154), Not Legal (n=928), In limbo (n=157)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Many Americans will bet less if only allowed to do so in person

- Demographics with higher shares that would bet more:
 - Plain region (23%)
 - Ages 35-44 (24%)
 - Hispanic/Latinos (25%)
 - African Americans (24%)
- Demographics with higher shares that would bet less:
 - Ages 18-34 (38%)
 - Postgraduates or higher (35%)

If sports betting could only be done in-person, instead of mobile apps or websites, would you bet on sports more or less often?



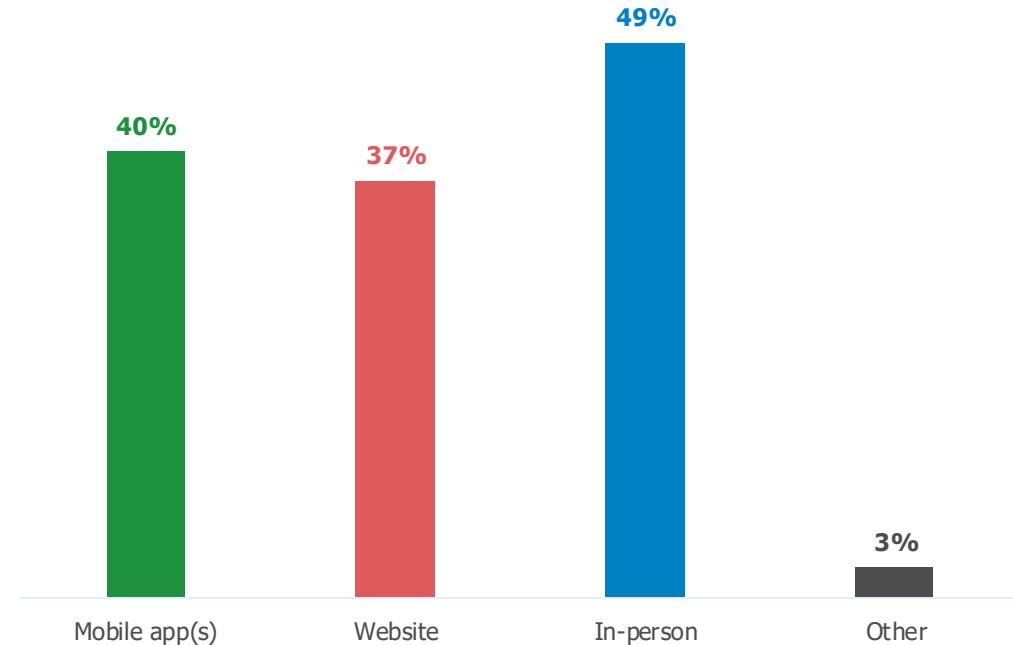
Q) If sports betting could only be done in-person, instead of mobile apps or websites, would you bet on sports more or less often? (n=920 respondents who have bet on sporting events)

[†] Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

Despite the rise of mobile sports betting, many bettors still bet in person

- Pacific, Western and Great Lakes regions use in-person betting the most
- More than half of respondents aged 18-44 use mobile apps when betting on sports, and over two thirds of bettors over 65 do it in person

Preferred Sports Betting Methods

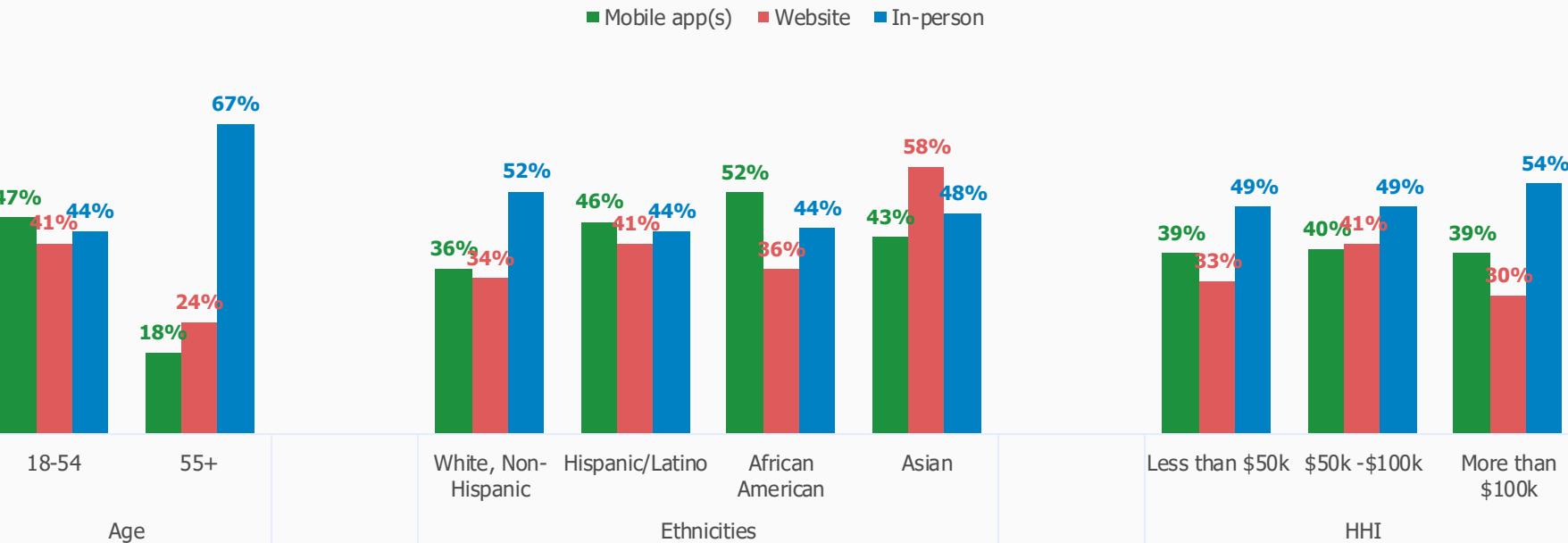


Q) What methods do you use to bet on sporting events? Select all that apply. (n=920 respondents who have bet on sporting events)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

White bettors prefer in-person betting, African Americans preferred using mobile apps, and Asians were most likely to bet via websites

Preferred Sports Betting Methods by Age, Gender and HHI



Q) What methods do you use to bet on sporting events? Select all that apply.

Subgroup: 18-54 (n=698), 55+ (n=222), White, Non-Hispanic (n=567), Hispanic/Latino+ (n=184), Black or African American (n=100), Asian (n=49), Less than \$50k (n=286), \$50k - \$100k (n=517), More than \$100k (n=117)

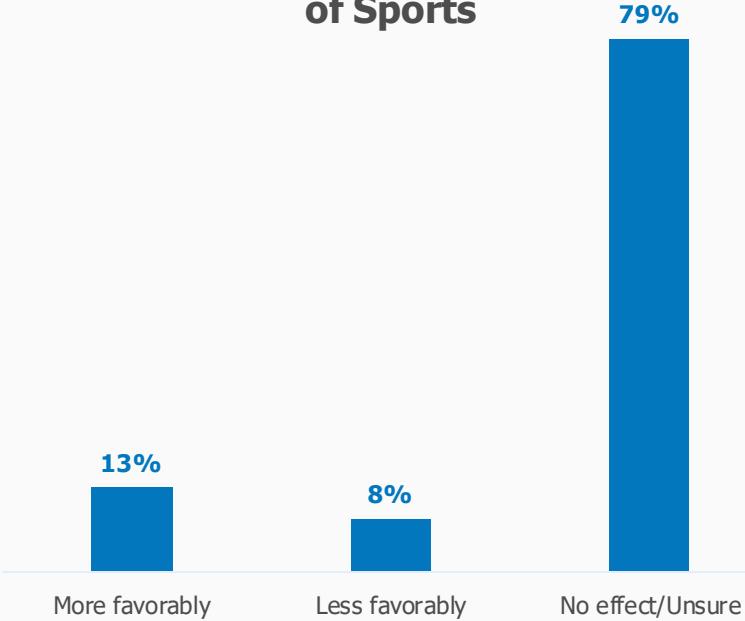
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Identify

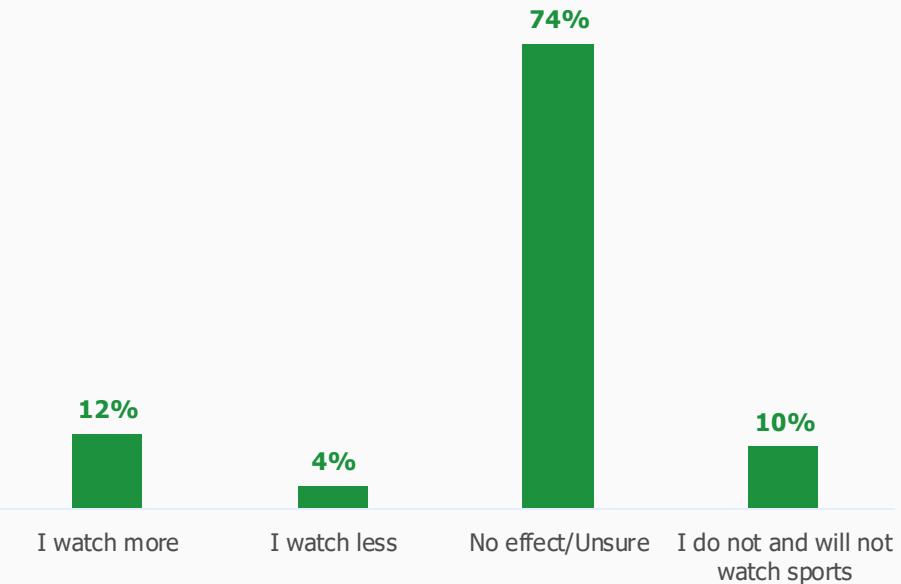
Identify the driving forces behind sports betting acceptance

Recent increases in the legalization of sports betting largely have not affected the public's opinion or viewing habits of sports

Sports Betting's Effect on Opinion of Sports



Sports Betting's Effect on Viewing Habits of Sports



Q) How has this rule change which allows adults in some states to bet on sporting events affected your opinion of sports, in general?

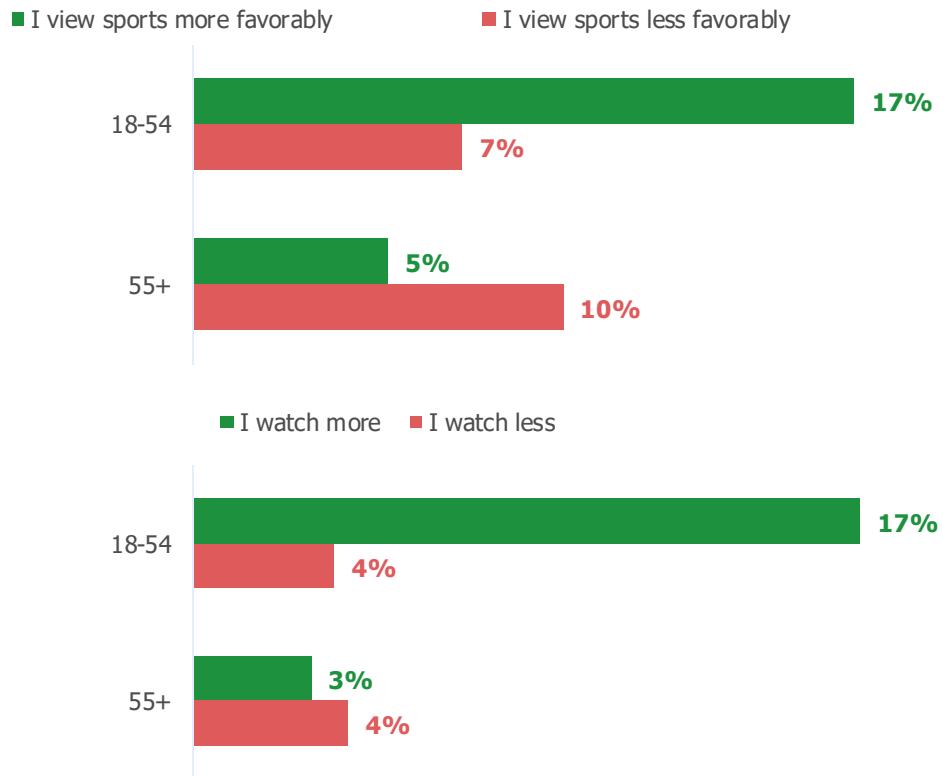
Q) How has this rule change which allows adults in some states to bet on sporting events affected your viewing habits of sports, in general? (n=2400)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Sports betting is a boost among younger Americans, a drawback among older Americans

- Regardless of age, most Americans' opinions and viewing habits of sports remain unaffected by sports betting
- However, the changes that do exist tend to be positive for younger Americans and negative for older Americans

Change of Opinion and Watching Behavior by Age



Q) How has this rule change which allows adults in some states to bet on sporting events affected **your opinion of sports**, in general?

Q) How has this rule change which allows adults in some states to bet on sporting events affected **your viewing habits of sports**, in general?

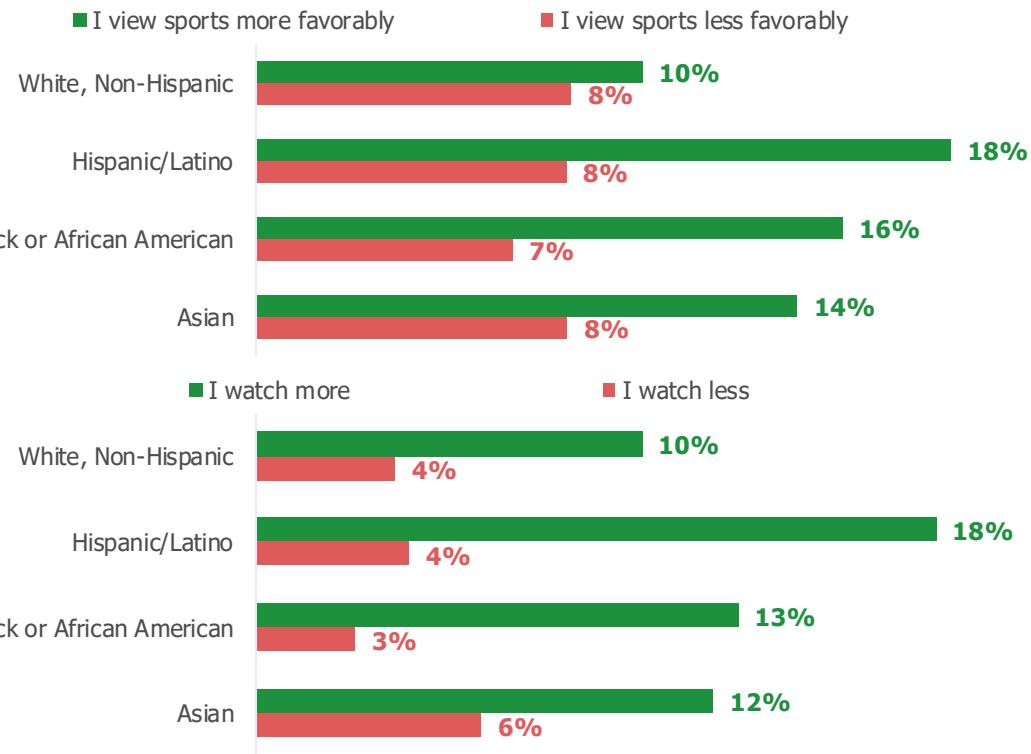
Subgroup: 18-54 (n=1493), 55+ (n=907)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Sports betting makes sports more attractive to Hispanics and African Americans

- When it comes to sports betting, White/non-Hispanic respondents' attitudes are largely unaffected
- Sports betting has slightly improved the opinions of non-white respondents regarding sports and has influenced them to watch more

Change of Opinion and Watching Behavior by Ethnicities



Q) How has this rule change which allows adults in some states to bet on sporting events affected **your opinion of sports**, in general?

Q) How has this rule change which allows adults in some states to bet on sporting events affected **your viewing habits** of sports, in general?

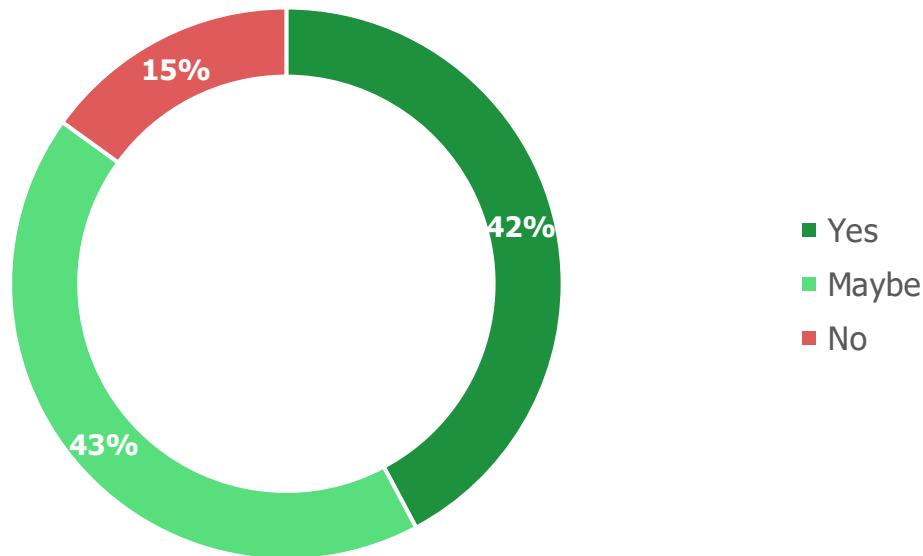
Subgroup: White, Non-Hispanic (n=1510), Hispanic/Latino+ (n=394), Black or African American (n=293), Asian (n=144)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All 33 numbers are correct.

Most Americans lean towards supporting policies aimed at curbing gambling addiction

- Demographics that are more likely to say yes:
 - Postgraduates higher (50%)
 - Liberals (49%)
 - Atlantic region (47%)
 - Ages 65+ (48%)
 - HHI \$50k - \$100k (46%)
- Demographics that are more likely to say no:
 - High School/GED or Less (19%)
 - Conservatives (19%)

Do you feel any measures should be put into place to prevent/and or treat compulsive sports betting?

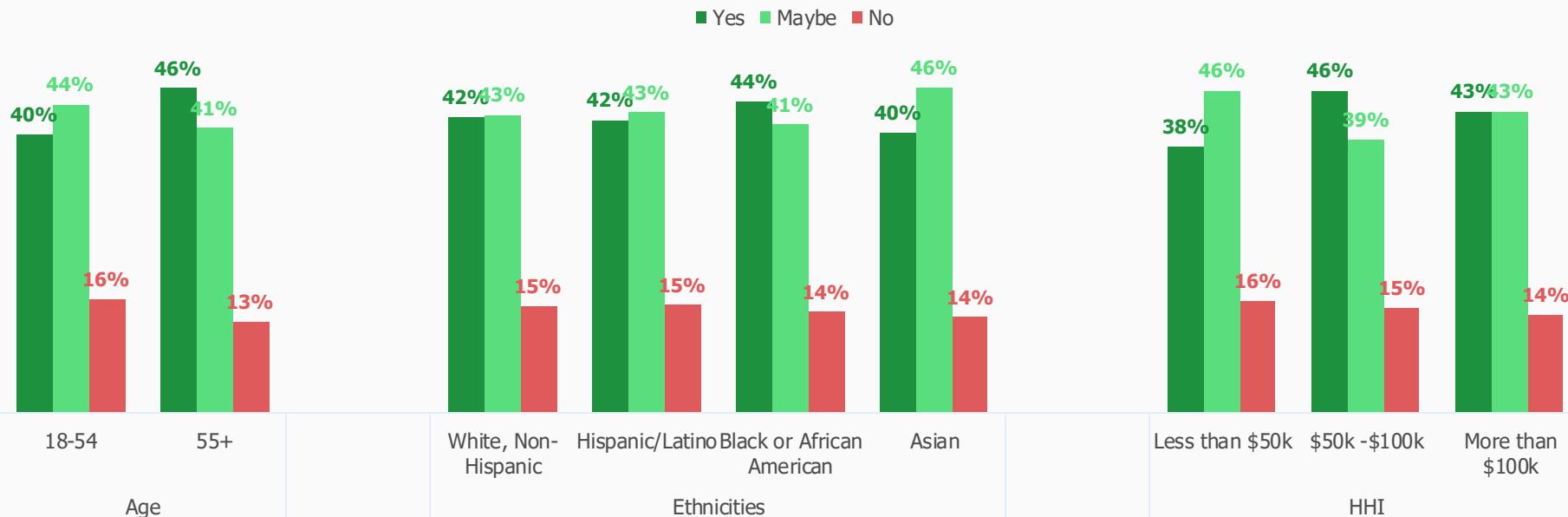


Q) Do you feel any measures should be put into place to prevent/and or treat compulsive sports betting?
(n=2400)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Older Americans are more likely to believe measures should be implemented to combat compulsive sports betting. Lower income Americans are more likely to be on the fence.

Do you feel any measures should be put into place to prevent/and or treat compulsive sports betting?



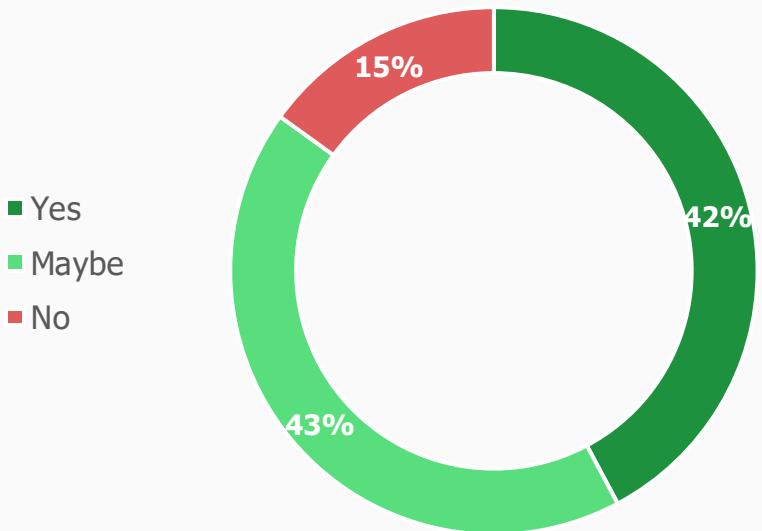
Q) Do you feel any measures should be put into place to prevent/and or treat compulsive sports betting?

Subgroup: 18-54 (n=1493), 55+ (n=907), White, Non-Hispanic (n=1510), Hispanic/Latino+ (n=394), Black or African American (n=293), Asian (n=144), Less than \$50k (n=952), \$50k - \$100k (n=1218), More than \$100k (n=230)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Of the potential measures to combat compulsive sports betting, betting limits and treatment programs are the most popular

Do you feel any measures should be put into place to prevent/and or treat compulsive sports betting?



Preventative Measures

Limits placed on betting amounts imposed by sports betting platforms

25%

Treatment programs provided for problem sports gamblers paid for by the sports betting industry

23%

Responsible betting campaigns paid for by the sports betting industry

20%

Putting in place an independent government body authorized to audit, investigate, and regulate the sports betting industry to protect public health

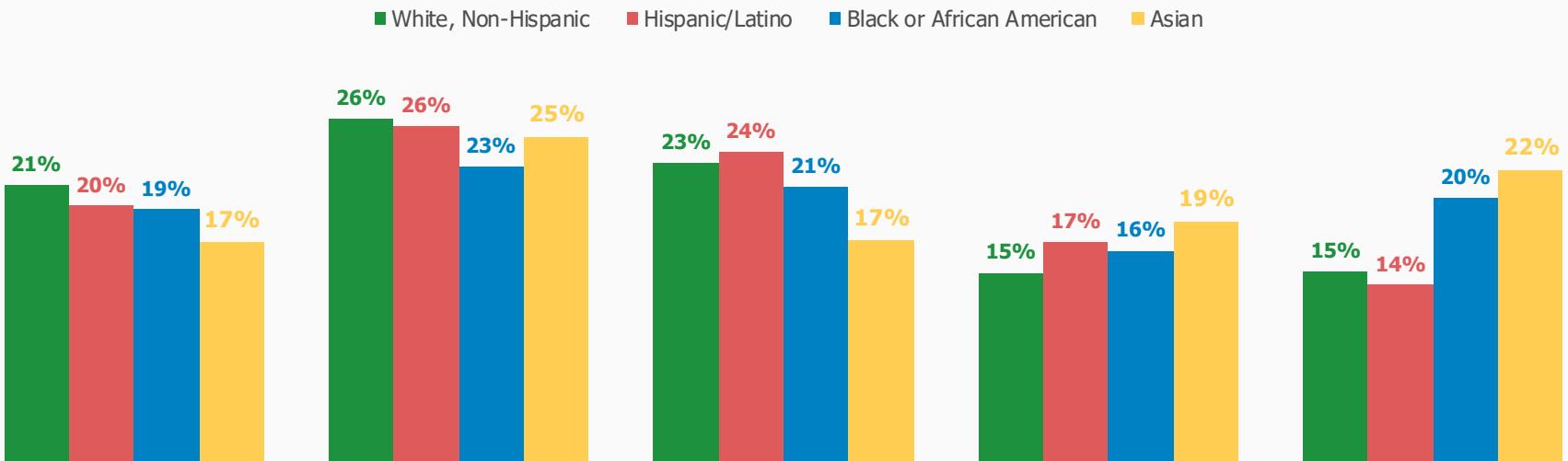
16%

Using data collected from sports betting platforms to identify, investigate, and intervene with gamblers engaging in potentially problematic behavior

16%

African Americans and Asians are more likely to support an independent authority to regulate the sporting industry

Preventative Measures by Ethnicity



Responsible betting campaigns paid for by the sports betting industry

Limits placed on betting amounts imposed by sports betting platforms

Treatment programs provided for problem sports gamblers paid for by the sports betting industry

Using data collected from sports betting platforms to identify, investigate, and intervene with gamblers engaging in potentially problematic behavior

Putting in place an independent government body authorized to audit, investigate, and regulate the sports betting industry to protect public health

Q) Do you feel any measures should be put into place to prevent/and or treat compulsive sports betting? (n=2400)

Q) Which of the following types of measures would be of most interest to you? (n=2039 respondents who said yes or maybe to the above question)

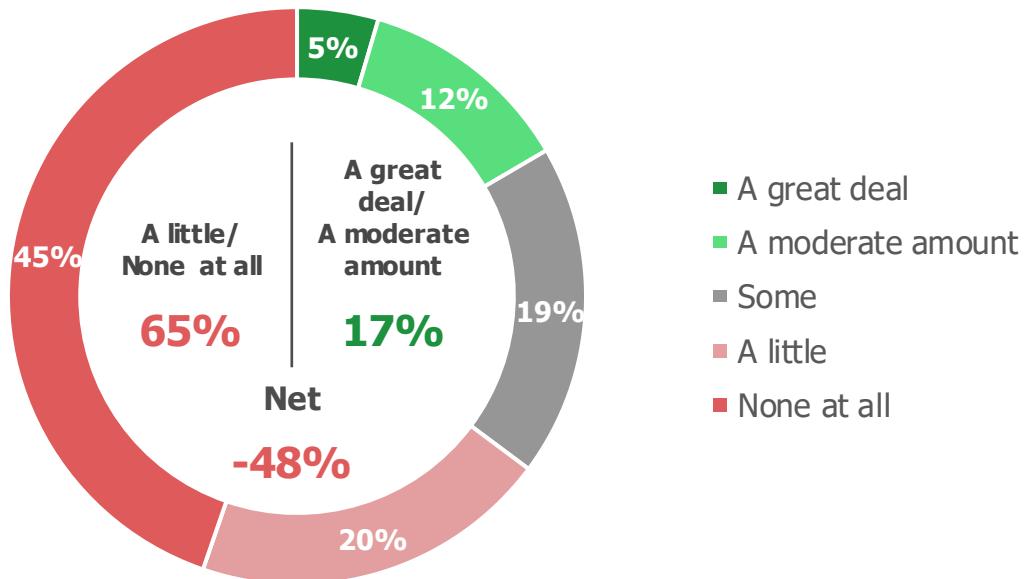
Subgroup: White, Non-Hispanic (n=1279), Hispanic/Latino (n=333), Black or African American (n=251), Asian (n=124)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Many Americans have not heard news regarding potential harms of betting

- Demographics that are more likely to have heard a great deal/moderate amount:
 - Ages 35-44 (25%)
 - Hispanic/Latinos (23%)
 - Atlantic region (22%)
 - Postgraduates or higher (22%)
- Demographics that are more likely to have heard a little/none at all:
 - Ages 65+ (75%)
 - High School/GED or Less (71%)
 - Females (69%)
 - Pacific region (69%)

How many times do you recall seeing any messaging concerning the potential harms of sports betting?

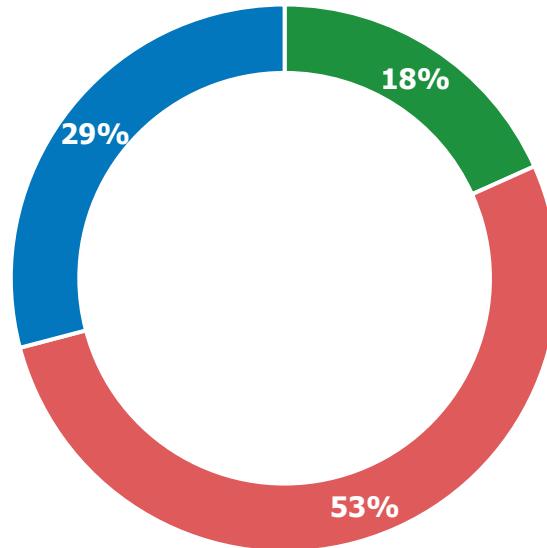


Q) How many times do you recall seeing any messaging concerning the potential harms of sports betting? (n=2400)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

More than half of Americans think sports betting won't influence existing behaviors

- Demographics that think it's an opportunity for everyone:
 - Ages 35-44 (25%)
 - Postgraduates or higher (23%)
 - Hispanic/Latinos (23%)
- Demographics that think it won't influence existing behavior:
 - Ages 65+ (58%)
 - Pacific region (57%)
- Demographics that are concerned about the effect on lower-income individuals:
 - Ages 55+ (35%)
 - Asians (35%)

Which statement most closely matches your feelings regarding individual responsibilities around sports betting?



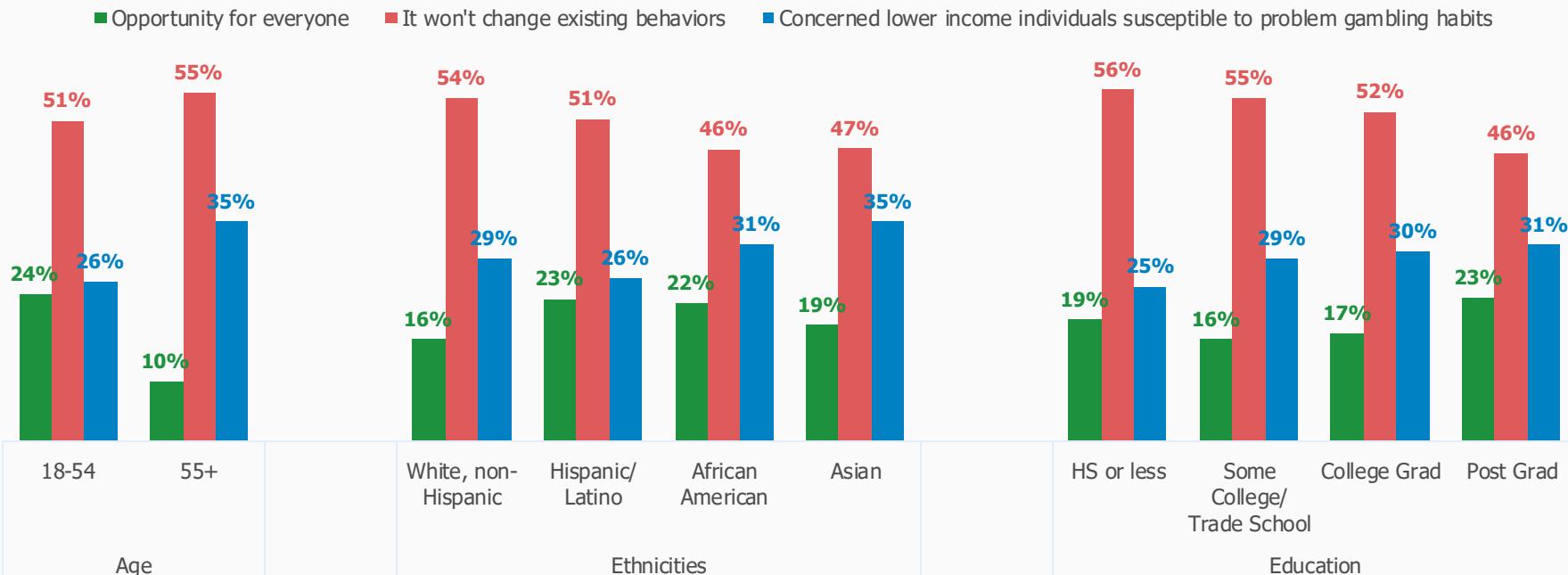
- Opportunity for everyone
- It won't change existing behaviors
- Concerned lower income individuals susceptible to problem gambling habits

Q) Which statement most closely matches your feelings regarding individual responsibilities around sports betting?
(n=2400)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

Concern for lower-income individuals was most often found in Seniors, African Americans, Asians, and respondents with high school education or higher

Perception of Sports Betting by Demographics



Q) Which statement most closely matches your feelings regarding individual responsibilities around sports betting?

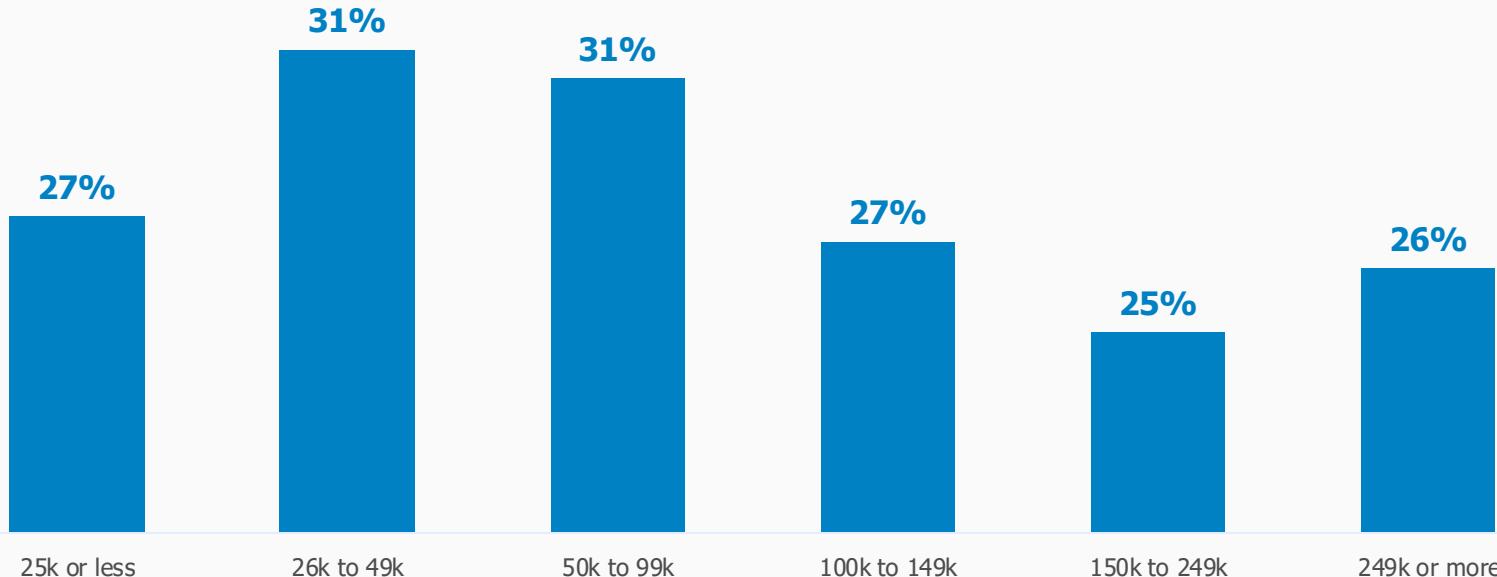
Subgroup: 18-54 (n=1493), 55+ (n=907), White, Non-Hispanic (n=1510), Hispanic/Latino+ (n=394), Black or African American (n=293), Asian (n=144), HS or less (n=424), Some college/Trade School (n=783), College Grad (n=785), Post Grad (n=408)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Lower-income and middle-income Americans are concerned about the risk to lower-income individuals

Concerns Regarding Problem Gambling Habits by HHI

■ I am concerned that the ease of sports betting may make lower income individuals susceptible to problem gambling habits



Q) Which statement most closely matches your feelings regarding individual responsibilities around sports betting?

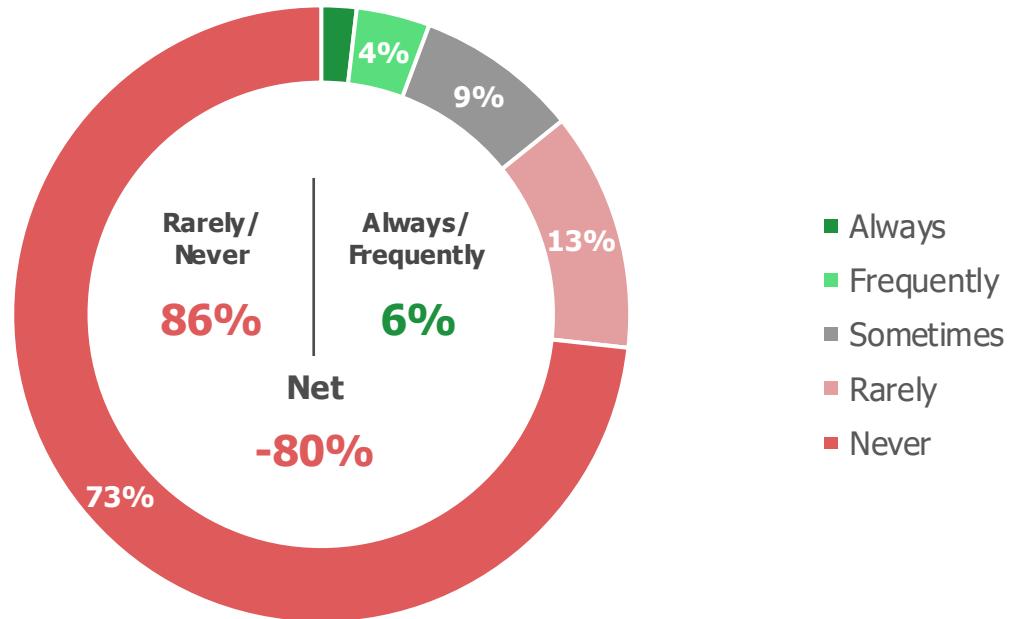
Subgroup: \$25k or less (n=390), \$26k to \$49k (n=561), \$50k to \$99k (n=851), \$100k to \$149k (n=367), \$150k to \$249k (n=173), More than \$250k (n=57)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Most respondents believe they gamble within their limits

- Demographics that are more likely never to gamble outside their limits:
 - Ages 65+ (89%)
 - Rural residents (82%)
 - Southern region (79%)
 - Females (78%)
 - White, Non-Hispanics (77%)

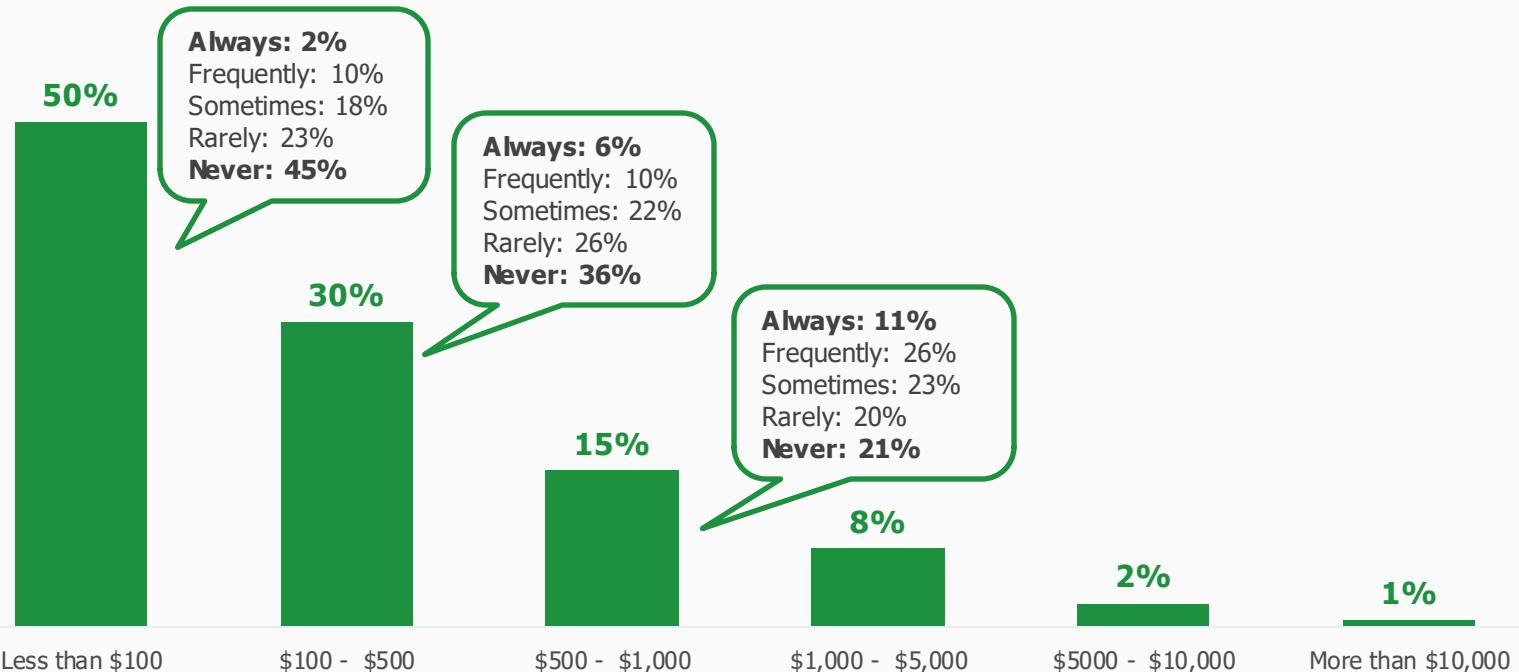
Have you ever placed bets in dollar amounts that are greater than what you are comfortable losing?



Q) Have you ever placed bets in dollar amounts that are greater than what you are comfortable losing? (n=2400)
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

People who make larger bets tend to think they are riskier

Expenditure on Sports Betting



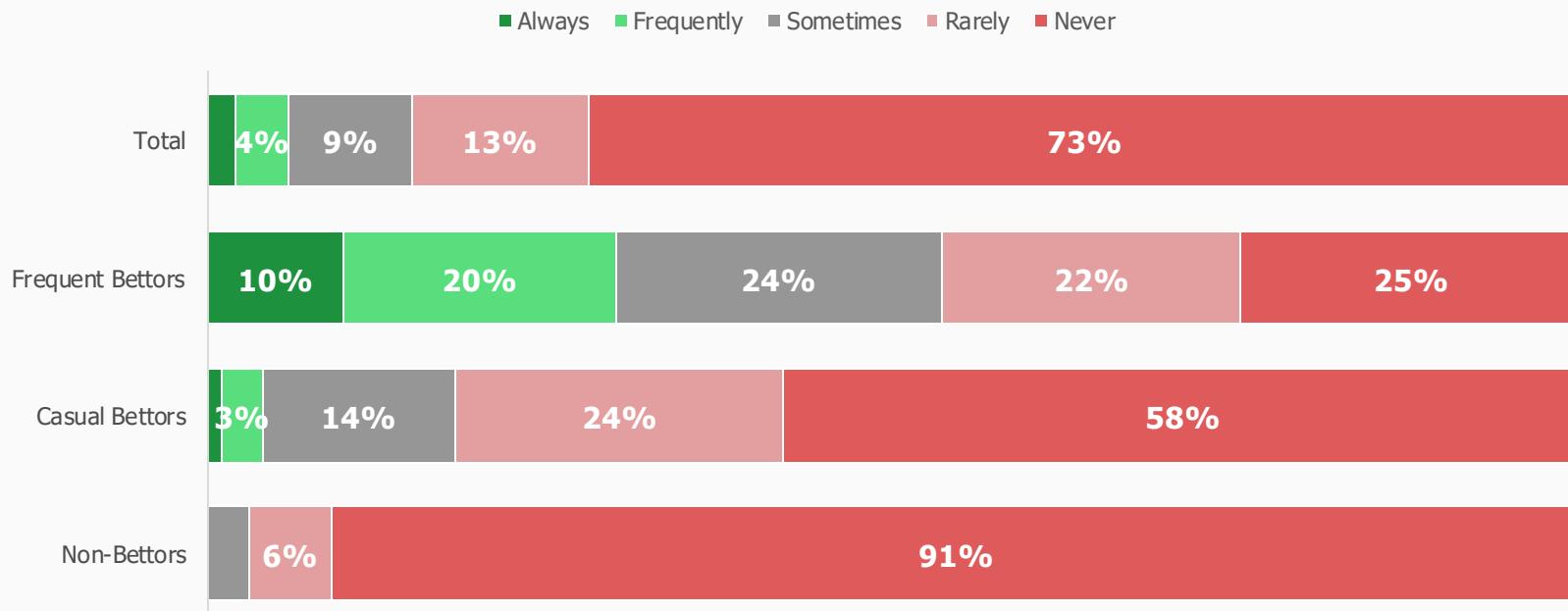
Q) How much money in total have you bet on sports in the last year? Select all that apply. (n=458 Less than \$100, n=277 \$100-\$500, n=142 \$500-\$1,000, n= 71 \$1,000 - \$5,000, n=22 \$5,000-\$10,000, n=6 More than \$10,000)

Q) Have you ever placed bets in dollar amounts that are greater than what you are comfortable losing? (n=920 n=920 respondents who have bet on sporting events)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Frequent bettors are more likely to make riskier bets

Frequency of Risky Bets by Frequency of Bets



Q) Have you ever placed bets in dollar amounts that are greater than what you are comfortable losing?

Q) How often do you bet on sporting events, if at all?

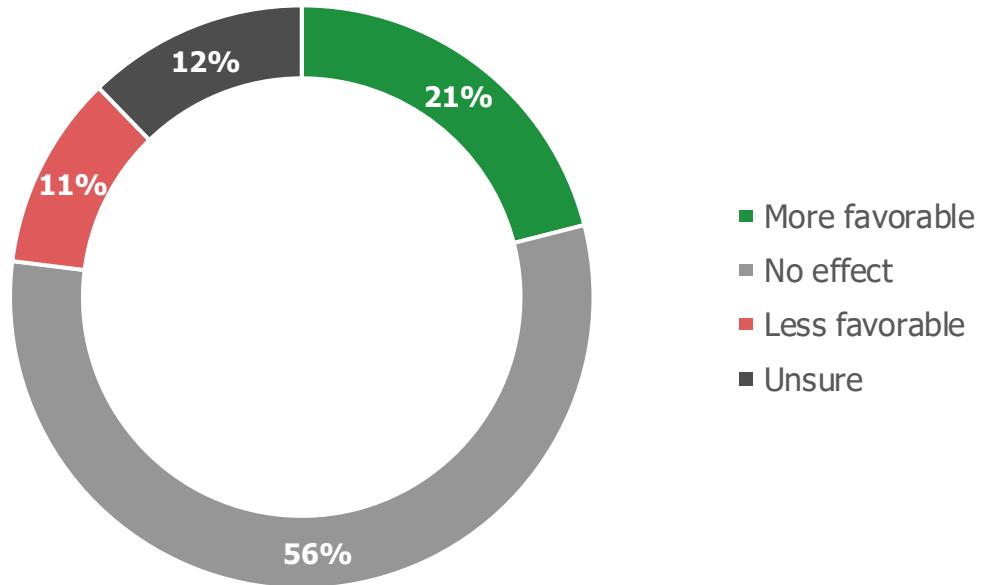
Subgroup: Total (n=2400), Frequent bettors (n=357), Casual bettors (n=563), Non-Bettors (n=1480)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Tax income from sports bets turns about one fifth of respondents to support sports betting

- Demographics made more favorable:
 - People who already favored sports betting (33%)
 - Ages 35-44 (30%)
 - Males (24%)
 - Urban residents (26%)
- Demographics made less favorable:
 - People who already opposed sports betting (16%)
 - Ages 18-34 (16%)
 - Hispanic/Latinos (18%)
- 67% of those who already opposed sports betting said the message had no effect

Favorability of Sports Betting Once Informed about Tax Revenue



Q) Many states use tax that individuals win while sports betting as another source of tax income. Does knowing this make you view sports betting more or less favorable? (n=2400)

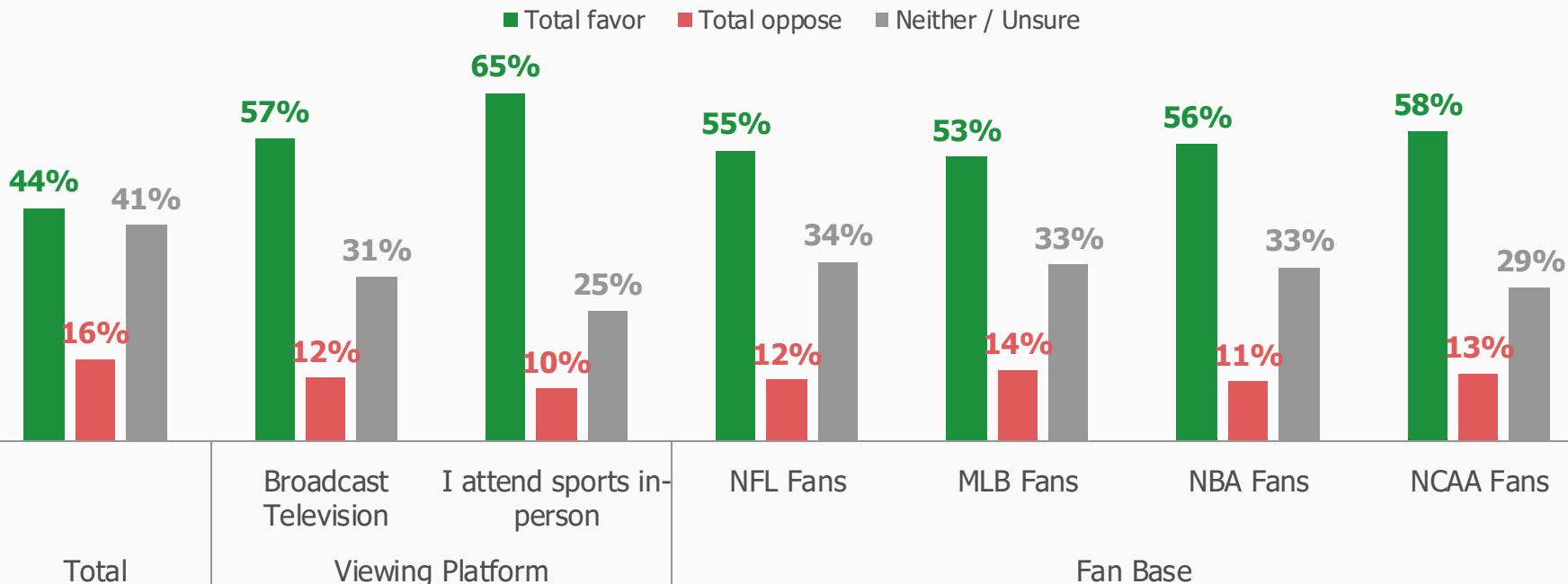
† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding.
All numbers are correct.

Discover

Discover the effect of sports betting amongst fans/spectators

Being a part of a sports fan base matters more than the fan base itself when it comes to support for sports betting

Opinion of Sports Betting



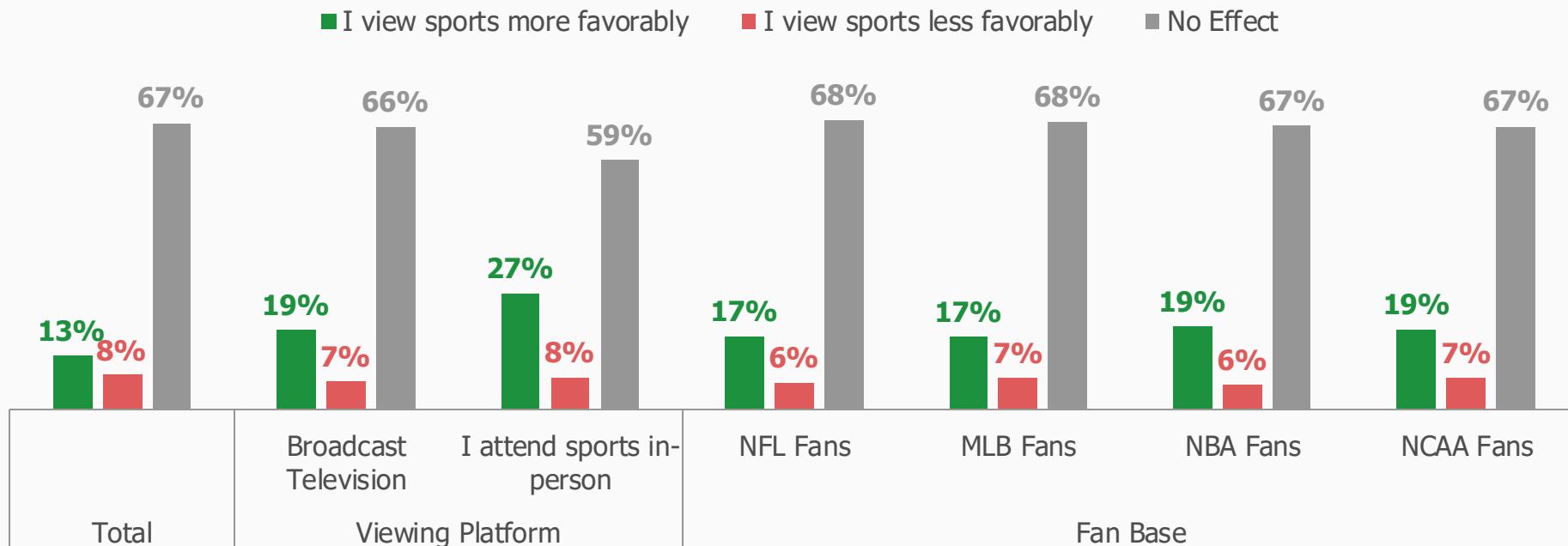
Q) As you may know, recently, the United States Supreme Court allowed states to legalize sports betting. Regardless of whether you personally would participate in sports betting, do you favor or oppose allowing adults in the United States to bet on sporting events?

Subgroup: Total (n=2400), Broadcast Television Total Often (n=1,337), In-person Total Often (n=515), NFL Fans (n=1547), MLB Fans (n=1401), NBA Fans (n=1236), NCAA Fans (n=1173)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

There is not a meaningful difference between sports fan bases when it comes to the effects of sports betting on opinion of sports

Sports Betting's Effect on Opinion of Sports



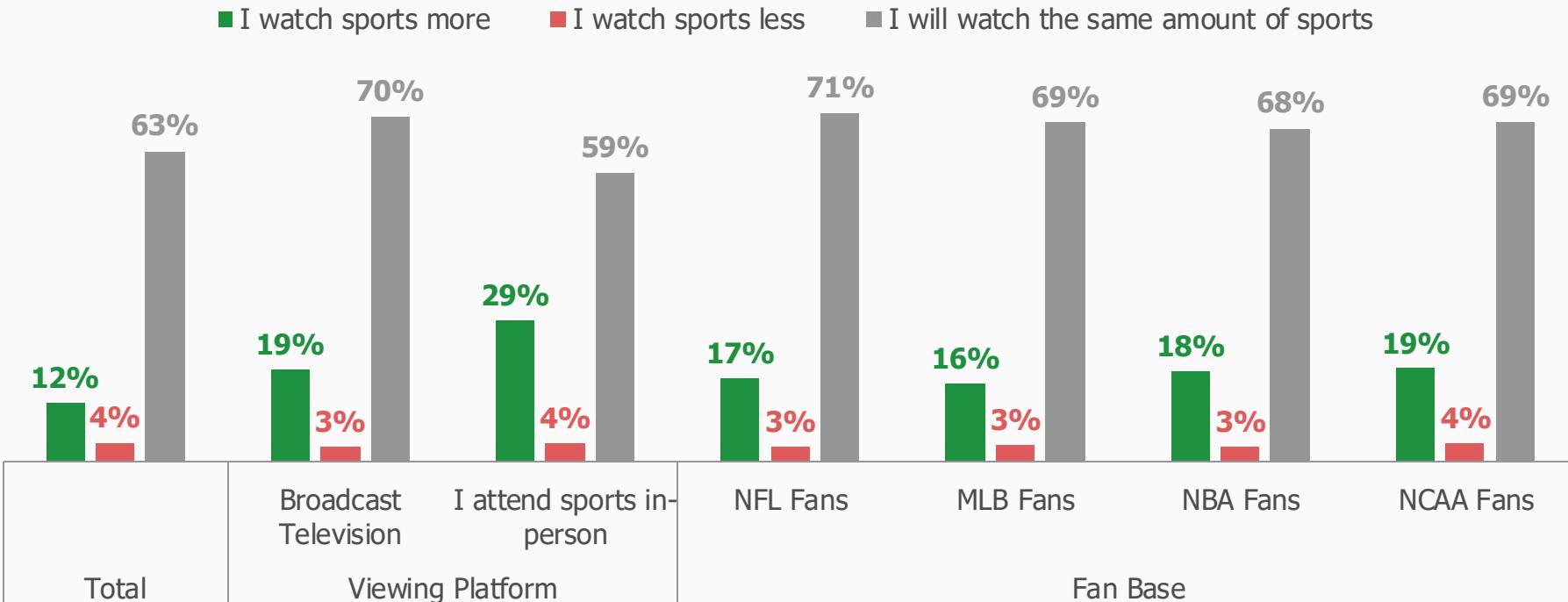
Q) How has this rule change which allows adults in some states to bet on sporting events affected your opinion of sports, in general?

Subgroup: Total (n=2400), Broadcast Television Total Often (n=1,337), In-person Total Often (n=515), NFL Fans (n=1547), MLB Fans (n=1401), NBA Fans (n=1236), NCAA Fans (n=1173)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Sports betting has caused small but significant bumps in sports viewership across multiple fan bases

Sports Betting's Effect on Viewing Habits of Sports



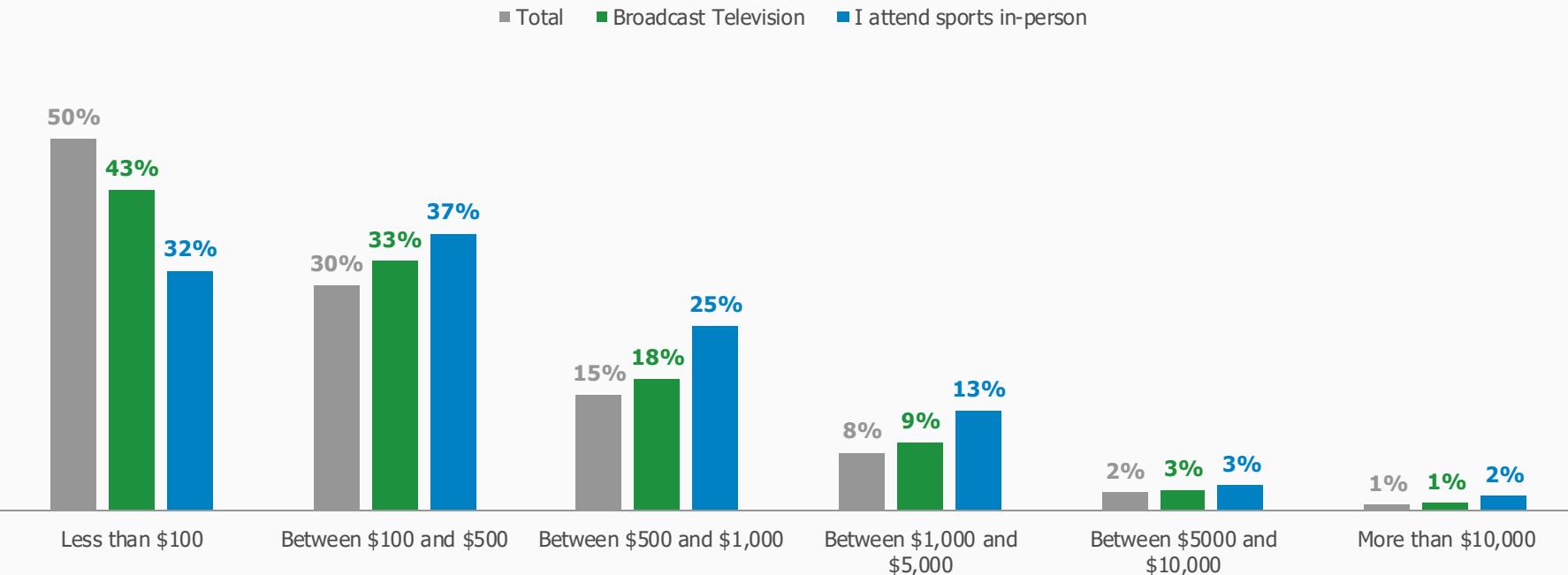
Q) How has this rule change which allows adults in some states to bet on sporting events affected your viewing habits of sports, in general?

Subgroup: Total (n=2400), Broadcast Television Total Often (n=1,337), In-person Total Often (n=515), NFL Fans (n=1547), MLB Fans (n=1401), NBA Fans (n=1236), NCAA Fans (n=1173)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Frequent sports viewers are more likely to make larger bets than the average American

Betting Amounts by Sports Viewing Platform



Q) How much money in total have you bet on sports in the last year? Select all that apply.

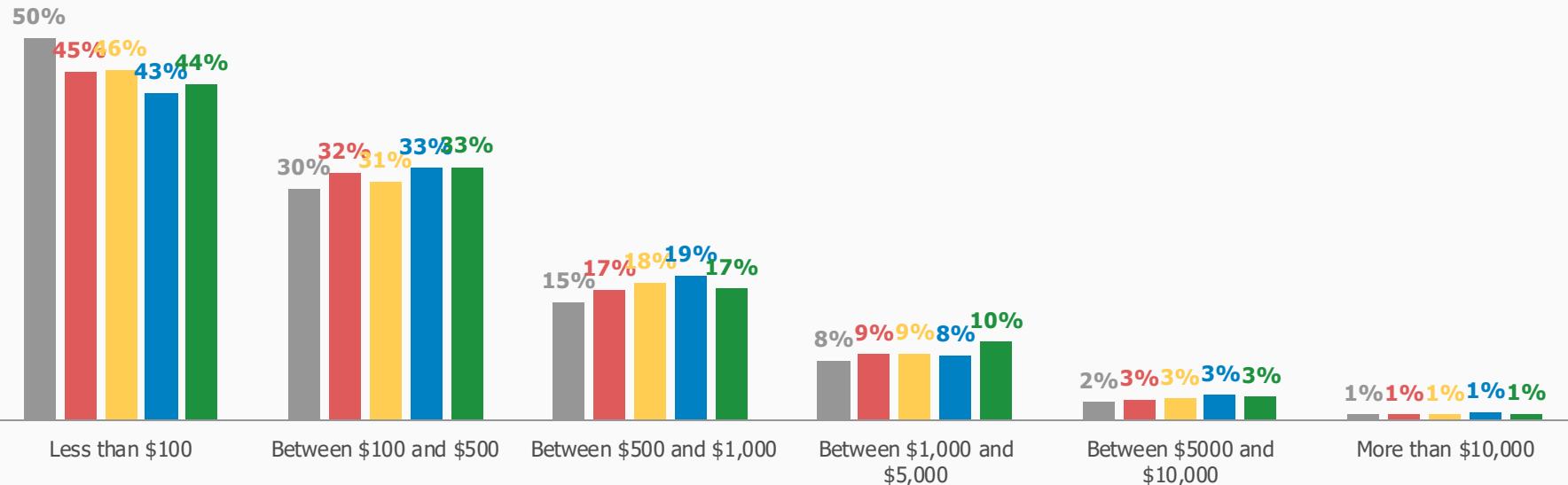
Subgroup: Total (n=2400), Broadcast Television Total Often (n=1,337), In-person Total Often (n=515)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Members of fan bases (regardless of sport) are more likely to make larger bets than the average American

Betting Amounts by Fan Base

■ Total ■ NFL Fans ■ MLB Fans ■ NBA Fans ■ NCAA Fans



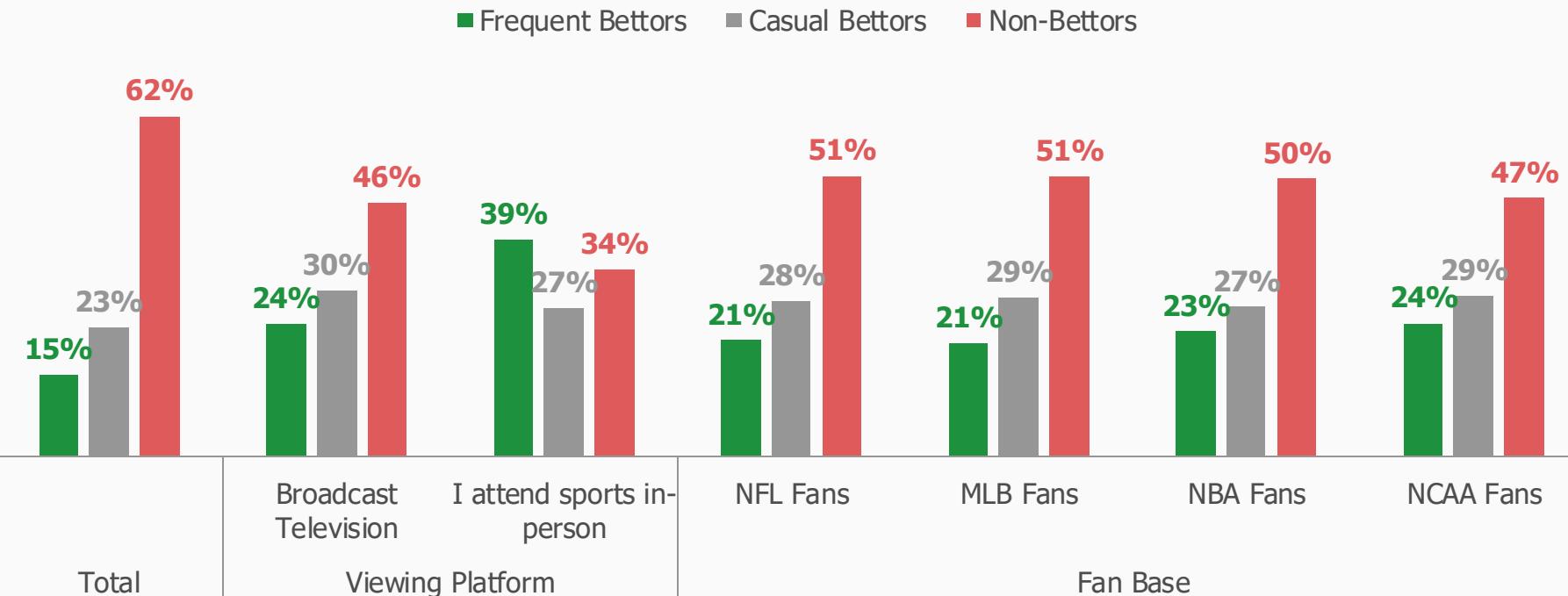
Q) How much money in total have you bet on sports in the last year? Select all that apply.

Subgroup: Total (n=920 respondents who bet on sports), NFL Fans (n=761 respondents who bet on sports), MLB Fans (n=691 respondents who bet on sports), NBA Fans (n=564 respondents who bet on sports), NCAA Fans (n=625 respondents who bet on sports)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.

Members of fan bases (regardless of sport) are more likely to make larger bets than the average American

Persona Membership by Sports Viewing Platform and Fan Base



Q) How often do you bet on sporting events, if at all?

Subgroup: Total (n=2400), Broadcast Television Total Often (n=1,337), In-person Total Often (n=515), NFL Fans (n=1547), MLB Fans (n=1401), NBA Fans (n=1236), NCAA Fans (n=1173)

† Note: Some numbers (on the chart or elsewhere) may not appear to be totaled correctly. This is due to rounding. All numbers are correct.



Key Takeaways

Despite the fact that many Americans have heard about sports betting, have seen an ad for a sports betting platform, and have a favorable opinion of sports betting, only a fraction of the public regularly gamble on sporting events. Those who gamble tend to be younger Hispanic men and often gamble on things other than sports. Older women tend to be the least positive on the concept of sports betting. The most common source of sports betting information tends to be television and word of mouth, but varies widely by age – with older Americans favoring traditional sources and younger Americans favoring more tech-intensive sources.

When it comes to the perceived effect of sports betting on sports as a whole, most respondents are ambivalent to the effects sports betting may have. However, the small share of respondents who perceive an effect see an overwhelmingly positive one – they watch sports more often and view them more favorably. There is little awareness or concern about the negative effects of sports betting, but some willingness for preventative measures.



Thank You

PHOENIX

602-362-5694
3550 N. CENTRAL AVE | STE. 1500
PHOENIX, AZ 85012

Project Lead Analyst: Jacob Joss
Project Manager: Haylye Plaster

Appendix

Methodology

Sample Summary – United States General Population

This national survey was conducted by OH Predictive Insights between January 13th – January 19th, 2022 from a nationwide general population (18+ year old) sample. The sample size was 2,400 completed surveys, with a MoE of $\pm 2.0\%$. All respondents were given the option to take the survey in English or Spanish; 30 opted to take the survey in Spanish, while 2,370 chose English. The sample demographics accurately reflected the target population's age, gender, region and ethnicity according to population statistics derived from recent US Census data for US adults. This survey was conducted via opt-in online panel. The survey included both regional and racial/ethnic oversamples, with a minimum of 300 respondents coming from each of the 6 regions defined in the survey and a minimum of 200 respondents each of Hispanic/Latinos, African Americans, and Asians.

Ethnicity	
White, non-Hispanic	63%
Hispanic	16%
Black or African American	12%
Asian	6%
Additional ethnicities	3%

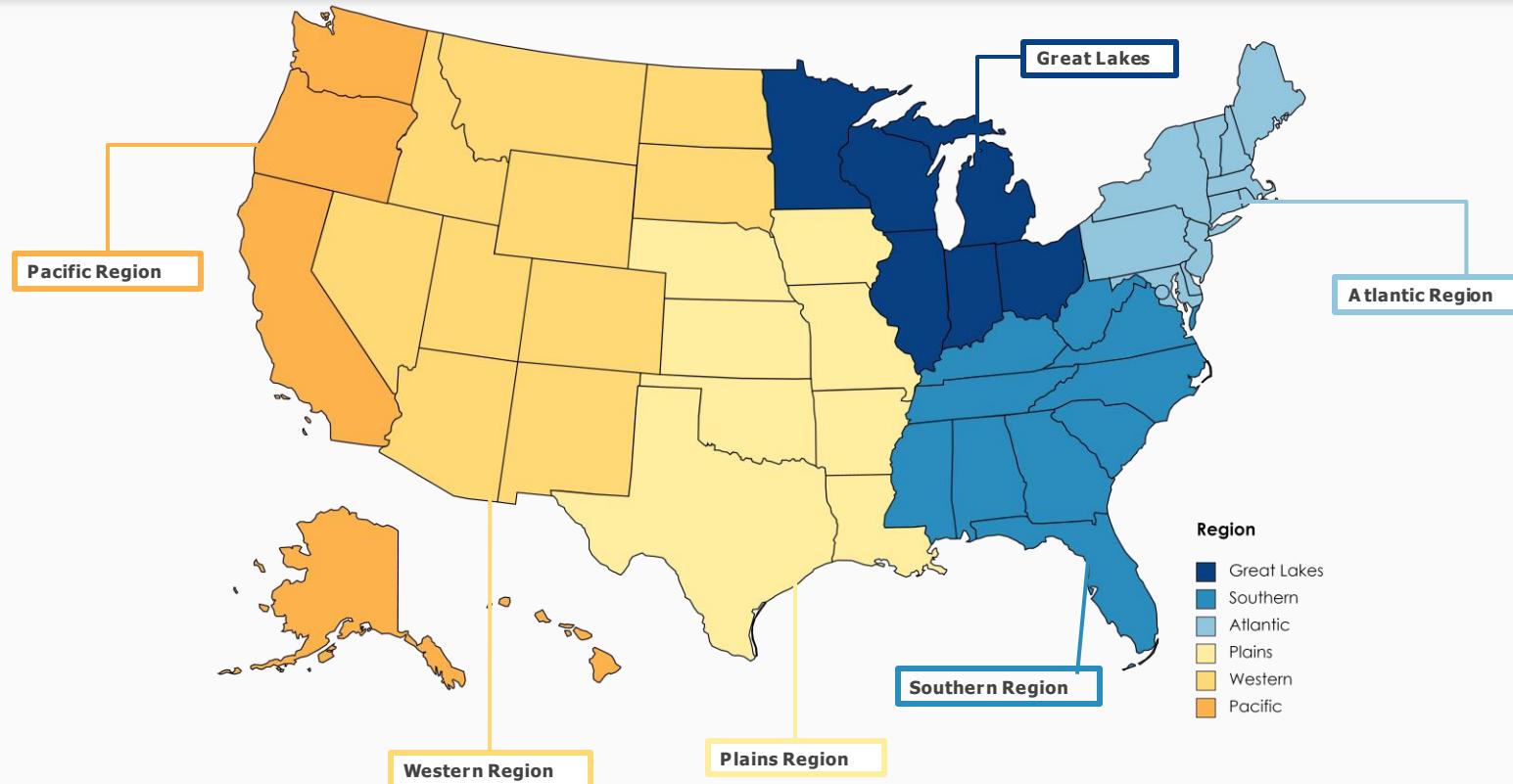
*Numbers may not total 100%, due to rounding.

Region	
Atlantic	20%
Great Lakes	16%
Pacific	16%
Plains	16%
Southern	24%
Western	8%

Age	
18-34	30%
35-44	16%
45-54	16%
55-64	17%
65+	21%

Sex Assigned at Birth	
Male	49%
Female	51%

Research Methodology – Regional



*n=1800 nationally, 300 per region

Research Methodology - Regional Sample Summaries

	Demographics	Southern	Pacific	Western	Plains	Atlantic	Great Lakes
Sex Assigned at Birth	Male	44%	50%	51%	48%	50%	51%
	Female	56%	50%	49%	52%	50%	49%
	Other	0%	0%	0%	0%	0%	0%
Age	18-34	28%	30%	32%	31%	30%	30%
	35-44	16%	19%	16%	17%	15%	16%
	45-54	18%	15%	15%	16%	16%	15%
	55-64	17%	16%	16%	15%	18%	17%
	65+	22%	20%	21%	20%	21%	22%
Ethnicity	White	60%	51%	73%	65%	61%	75%
	Hispanic	14%	27%	16%	19%	15%	9%
	African American	22%	4%	4%	11%	14%	10%
	Asian	4%	14%	3%	3%	6%	5%
	Additional Ethnicities	1%	4%	4%	2%	3%	2%