

Consumer Movement Toward Sports Betting

AUDIENCE DEFINITIONS



CORE

Placed a traditional sports bet at a casino, online, or with a bookie in the past 12 months.



CASUAL

No traditional sports bets in past 12 months, but have placed a bet via family/friends, pool, or fantasy.



POTENTIAL

No sports bets of any kind in past 12 months, but would do so in the future.



UNINTERESTED

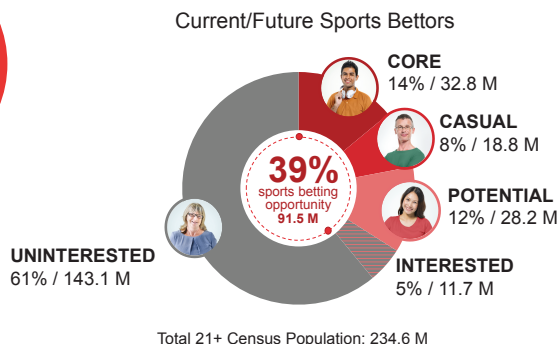
Have not and would not bet on sports.

*INTERESTED

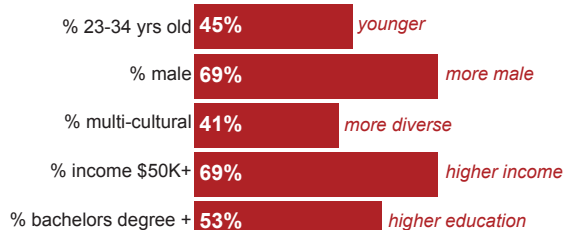
Would consider sports betting after being informed of PASPA repeal.

Landscape

The size of the sports betting market is significant and diverse.

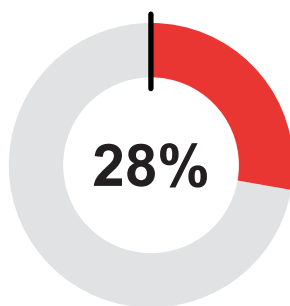


Core Sports Bettors

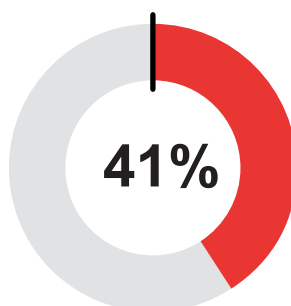


Awareness

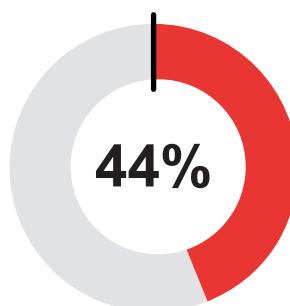
There is widespread uncertainty concerning the legal landscape.



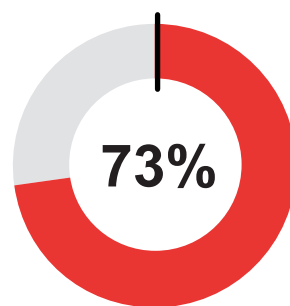
Just 28% of online sportsbook bettors think that they are betting with an offshore sportsbook.



Only 41% are aware that betting with a bookie is illegal.



44% of those in legalized states are unaware that casino sportsbooks are legal in their state.

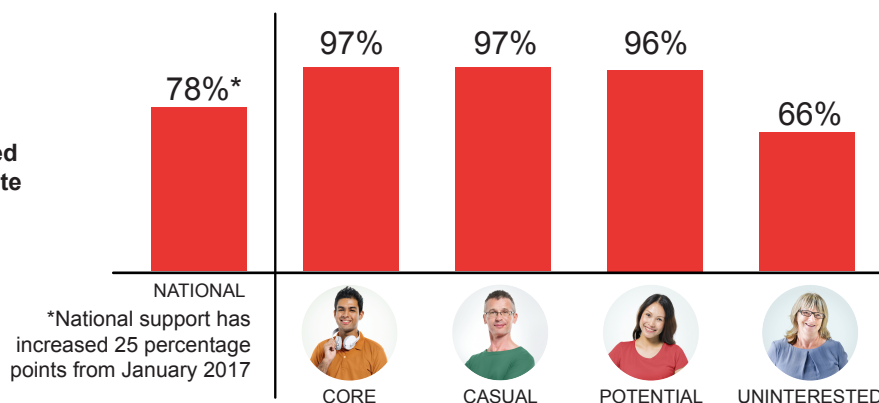


A supermajority says it is important to bet only via legal means.

Support

There is overwhelming support for states to legalize sports betting.

Support Legal, Regulated Sports Betting in My State



METHODOLOGY

Online survey
Nov. 8 - Dec. 7, 2018
Conducted in U.S.A.

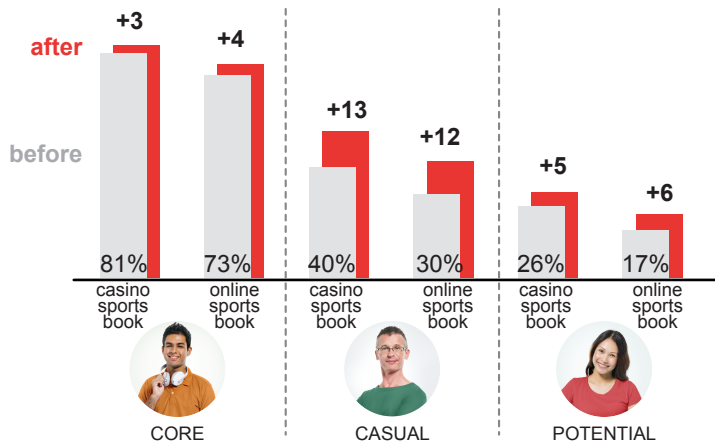
n=6,777 interviews among 21+ year-old Americans
- U.S. National Base
- Current and Future sports bettors
- Uninterested in sports betting



AMERICAN
GAMING
ASSOCIATION

Hearing about repeal and legalization would increase the percentage of consumers who expect to bet on sports.

Percent of Consumers Expecting to Bet on Sports, Next 12 Mo.
Showing Net Change



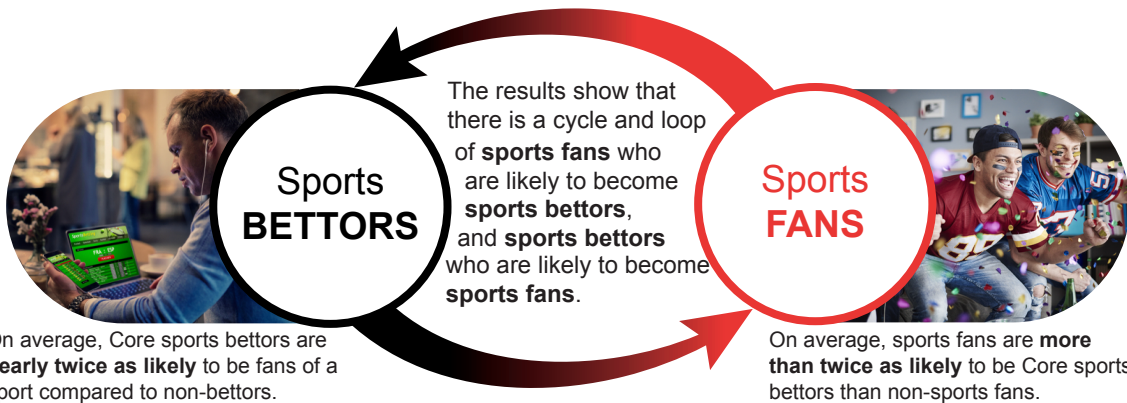
Impact of Legalization on
Core Sports Betting Frequency

Has changed
since legalization
in my state
(excluding NV)

placed more bets
46%

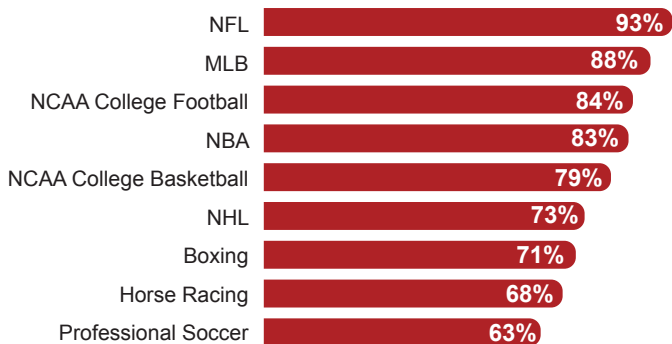
Would change
if legalized in
my state

would place more bets
69%



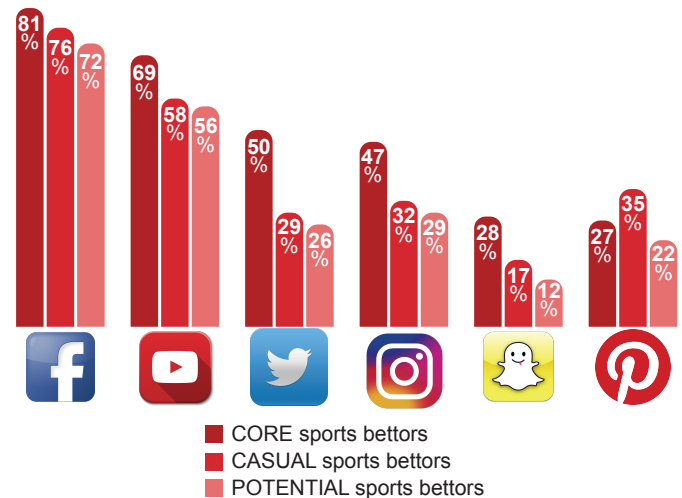
Sports League Interest and Social Media Use

Core Bettor Sports League Interest



■ CORE extremely/very/somewhat interested

Social Media Used on a Weekly Basis by Sports Bettor



■ CORE sports bettors
■ CASUAL sports bettors
■ POTENTIAL sports bettors