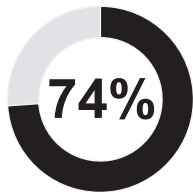


Bringing Sports Betting Consumers Back Onshore



52% of sports bettors participate in the illegal market.

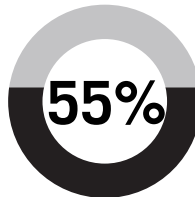
Today's sports bettors want to bet legally, but are unwittingly supporting offshore sites.



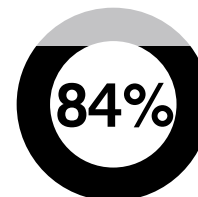
74% say it's important to only use legal sportsbooks.

What's Causing This Disconnect:

Consumer confusion around the legality of some methods of sports betting.



55% of illegal bettors believe they are mostly betting legally.



84% of these bettors are "surprised" to learn they are betting on illegal websites.

Consumers in legal states are shifting spend away from illegal bookies, **but offshore sites continue to benefit from consumer confusion over their status especially in states that have not yet legalized sports betting.**

	Legal Methods		Illegal Methods	
	CASINO SPORTSBOOK	U.S. ONLINE SPORTSBOOKS	BOOKIE	OFFSHORE ONLINE SPORTSBOOK
Legal States	-10%	+12%	-25%	+3%
Not Yet Legal States	+12%	+8%	-3%	+24%

Give Sports Betting Consumers What They Want: Safe, Legal Sports Betting Options

Step 1

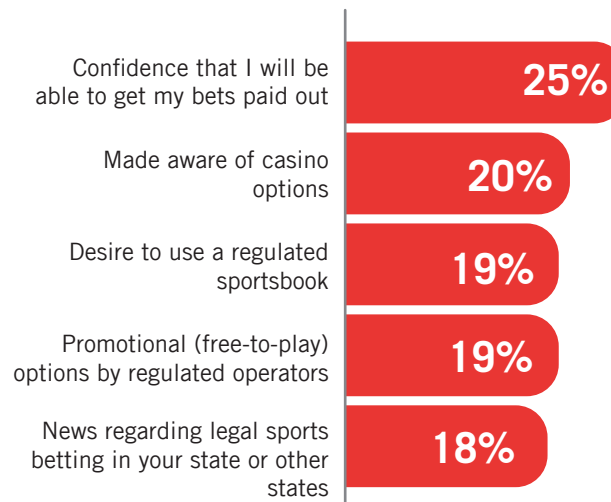
Educate consumers on what is and what is not legal.

48% Of illegal bettors would change their behavior after learning it is illegal.

Step 2

Give consumers access to the legal market.

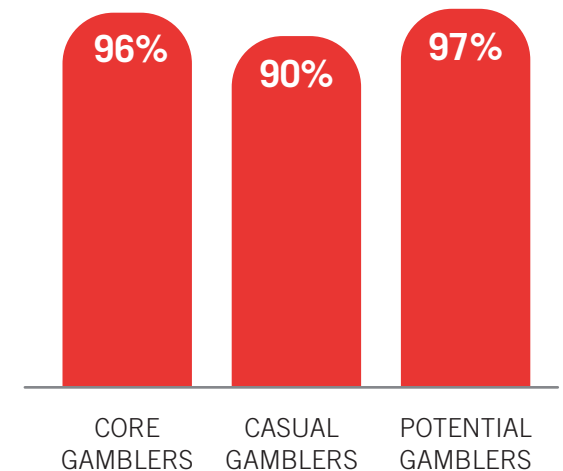
TOP REASONS FOR SHIFTING TO LEGAL BETTING



Step 3

Communicate the benefits of legal sportsbook providers.

SUPPORT FOR SPORTS BETTING LEGALIZATION IN MY STATE



METHODOLOGY

Online survey
Dec. 17, 2019 - Jan. 17, 2020

n=3,451 interviews among 21+ year-old Americans
- U.S. National Representative
- National Sports Bettors (current and future)

Survey conducted by Heart+Mind Strategies