

2022/Q2 review

A dynamic action shot from an American football game at night. A player in a red jersey with the number 33 is being tackled by a player in a white jersey with blue stripes and the number 57. The player in red is holding the football and is in mid-air, having just jumped over an orange pylon. The background shows a large stadium filled with spectators under bright lights.

# US gambling market Quarterly Report

LIVING CONSUMER INTELLIGENCE

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# Foreword

**Q2** is perhaps a **watershed for the industry** as US gross gaming revenue (GGR) shows signs of faltering in the face of rising inflation. With land-based casinos accounting for over two thirds of gambling spend the worry is that rising living costs will deal another major blow to many in a sector that is still recovering from the impact of Covid.

What this quarter's report demonstrates is that there are some areas of growth from Q1 in both offline and online activity.

The question moving forward is **how will online providers fair and how will growth opportunities play against a potential consumer slowdown.**



**Oliver Rowe**

Global Sector Head, Leisure &  
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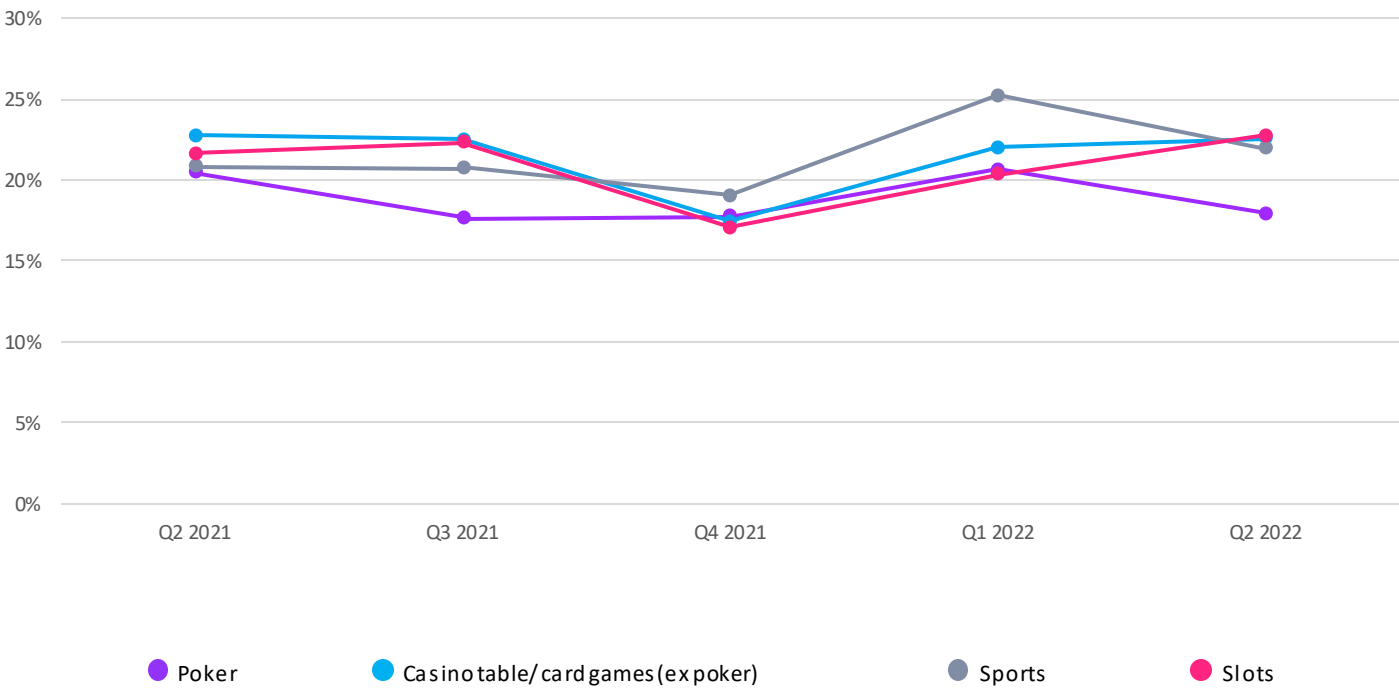


# Gambling last year

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# Online Gambling - Last Year (Gamblers)

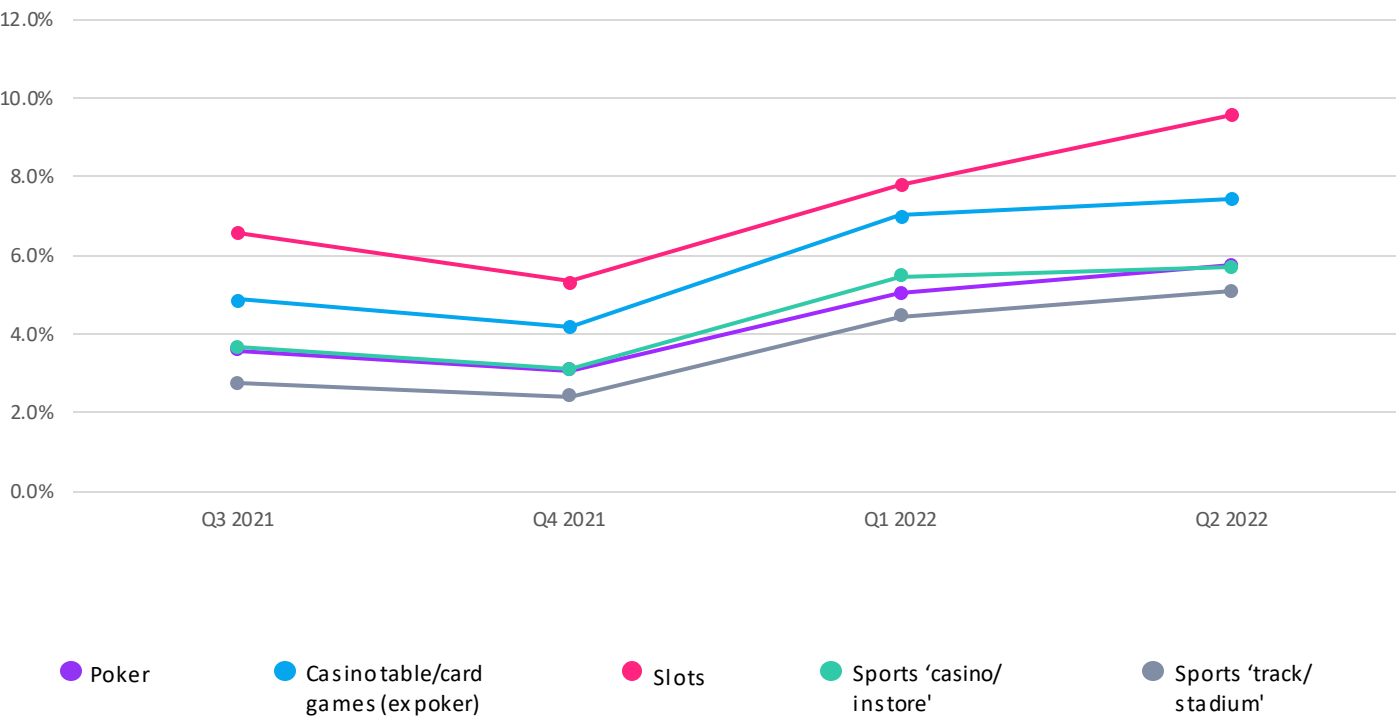


## Online gambling last year: Gamblers

Seasonality has perhaps brought online sports betting down slightly this quarter but it is up year on year while table games and slots are flat and poker shows some YOY decline.

Want to explore this further? Speak to a researcher

# Offline Gambling - Last Year (Nat rep)



## Offline gambling last year: General Population

All forms are up slightly year on year with slots showing most growth both YOY and QOQ, plus sports betting at a track or stadium looks to be tracking higher post-Covid.

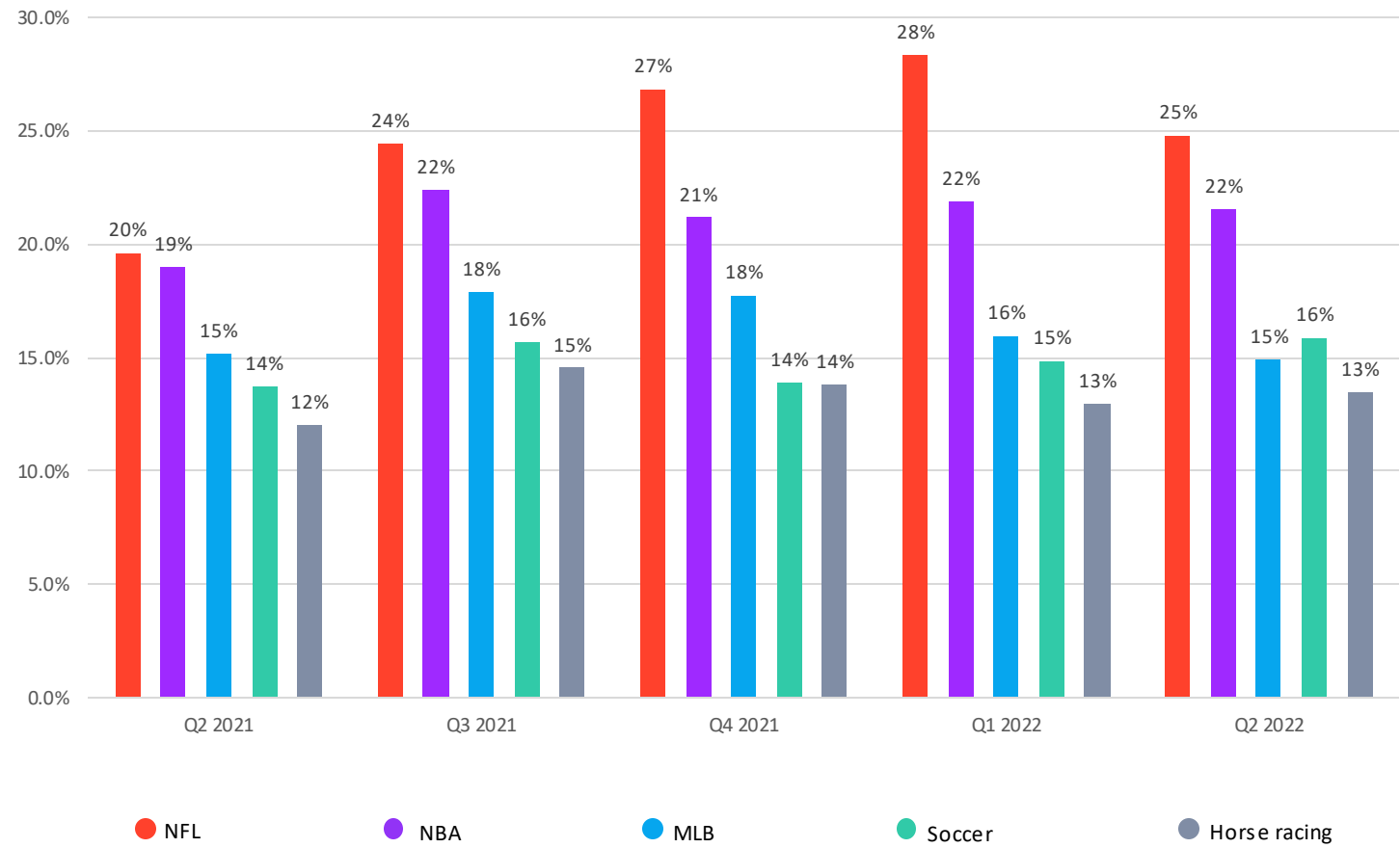
Want insights on prepaid consumers? Launch your own survey?

# Sports betting

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# Top 5 Sports Bet on - Last Year (Gamblers)

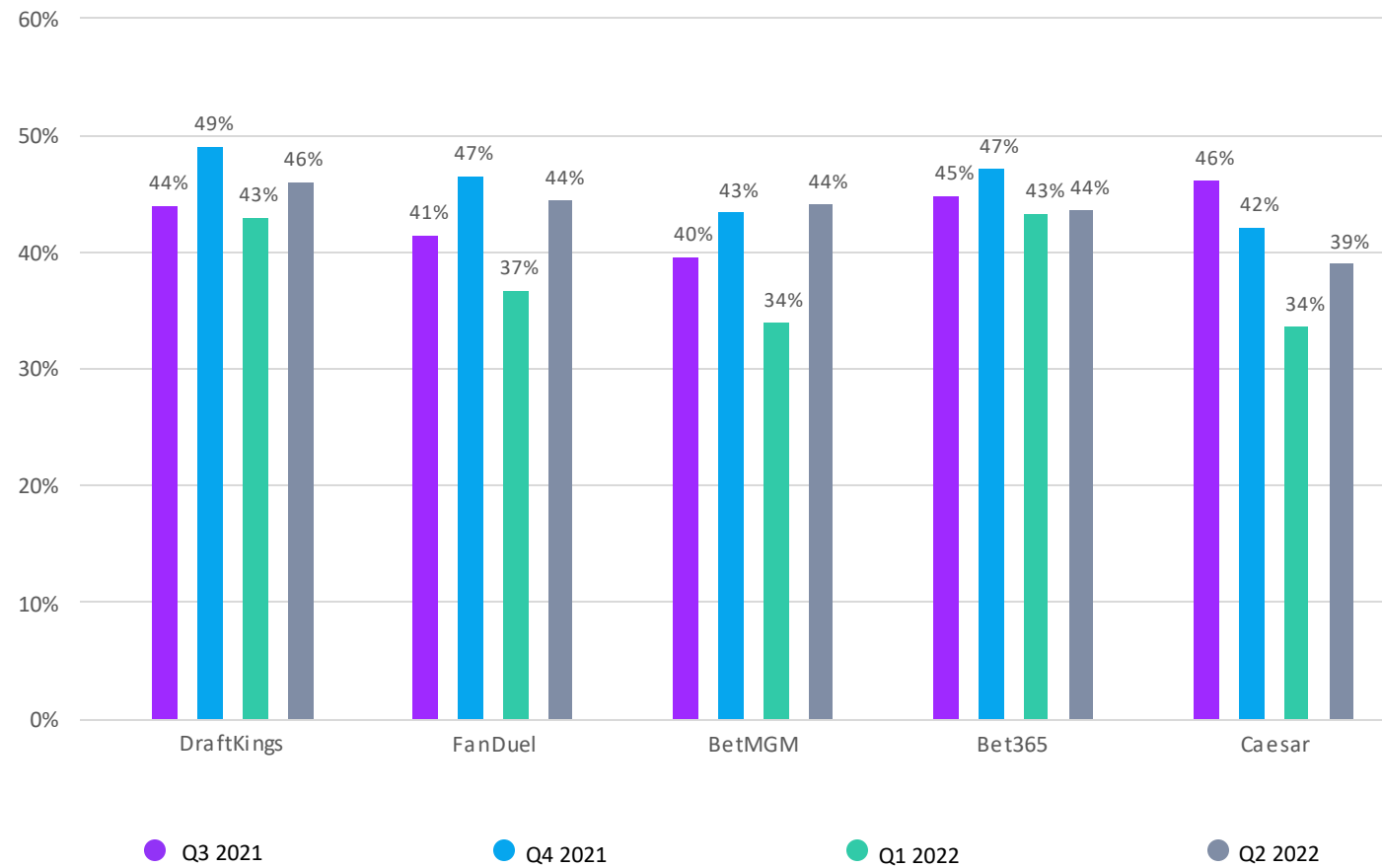


Sports betting:  
Top 5 sports regular gamblers wager bets on

While Q2 2022 scores have slipped a little for NFL and MLB since last quarter, four of the five sports have risen year on year.




## Account Conversion Rates (Open vs Use)



**Account Conversion Rates: Accounts have open vs used in past 7 days**

Conversion rates have improved QonQ for all five brands, plus DraftKings, FanDuel and BetMGM have improved since Q3 2021. Caesars Sportsbook has arrested recent declines but remains a few percentage points behind the other four brands. BetMGM has posted its highest score increase.

A close-up photograph of a basketball hoop and net. A basketball is in mid-air, passing through the white net. A player's hand is visible at the bottom, holding the ball. The background is a blurred crowd of spectators.

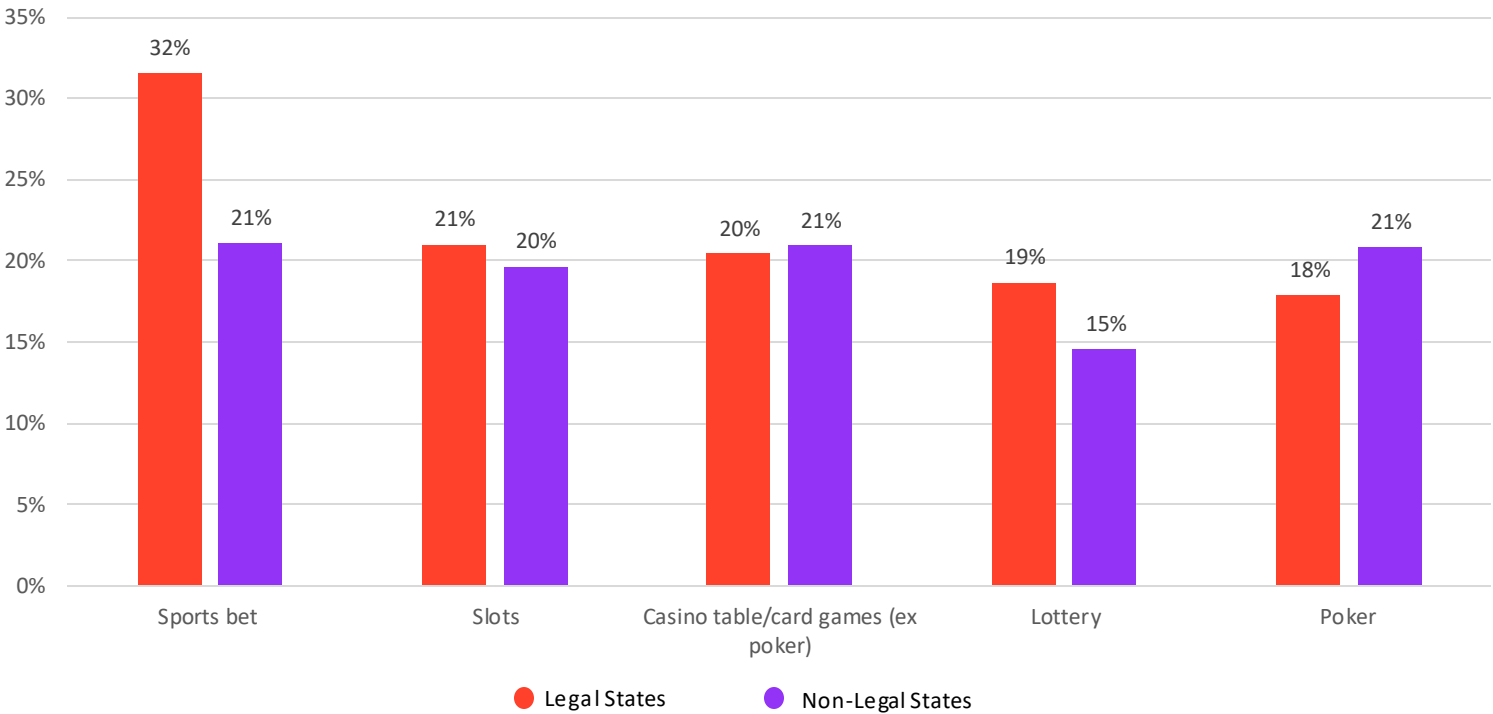
# Legalized US Gambling States

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Legalized US gambling States:  
Online gambling, legalized vs non legalized

Regular gamblers are almost **50% more likely** to bet on sports each month in legalized states than those in non-legal states.

Online Gambling Activities in Last month - Legal vs Non Legal States (Gamblers)

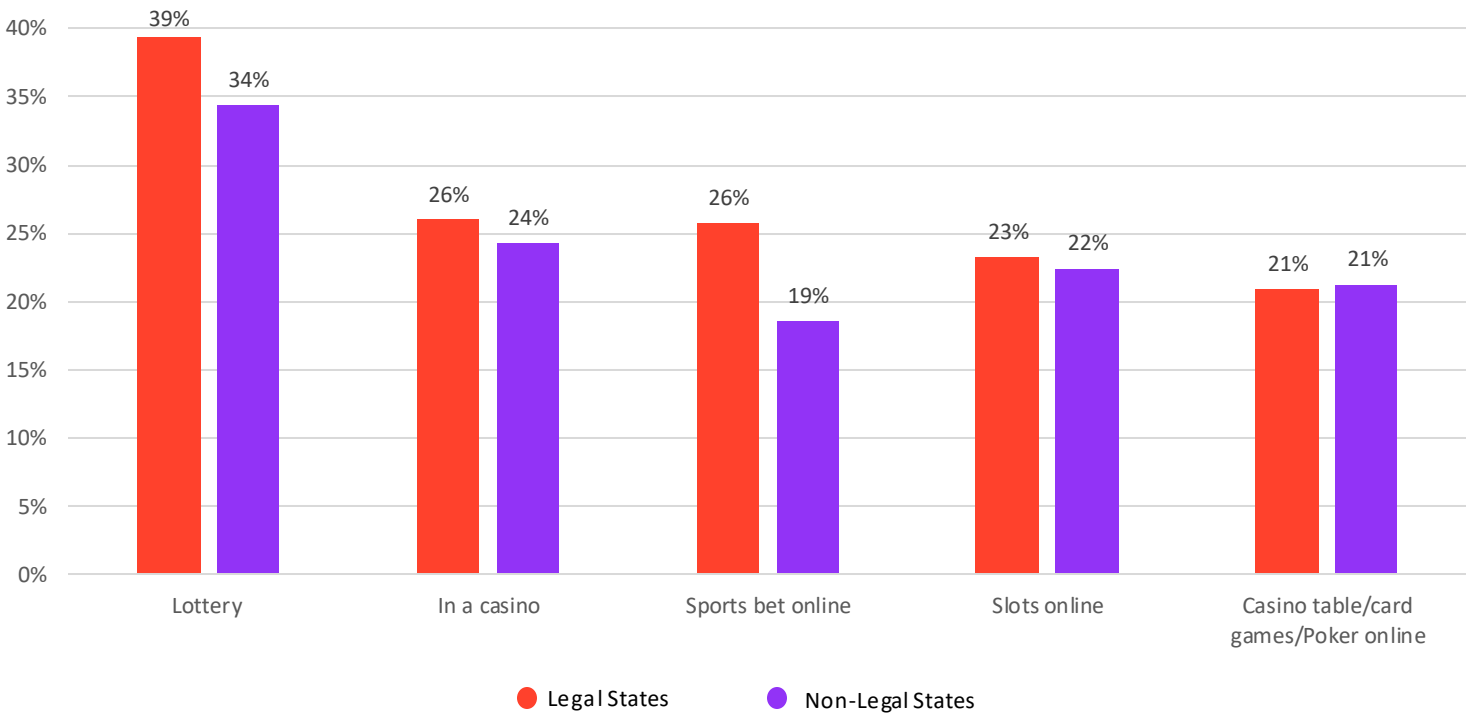




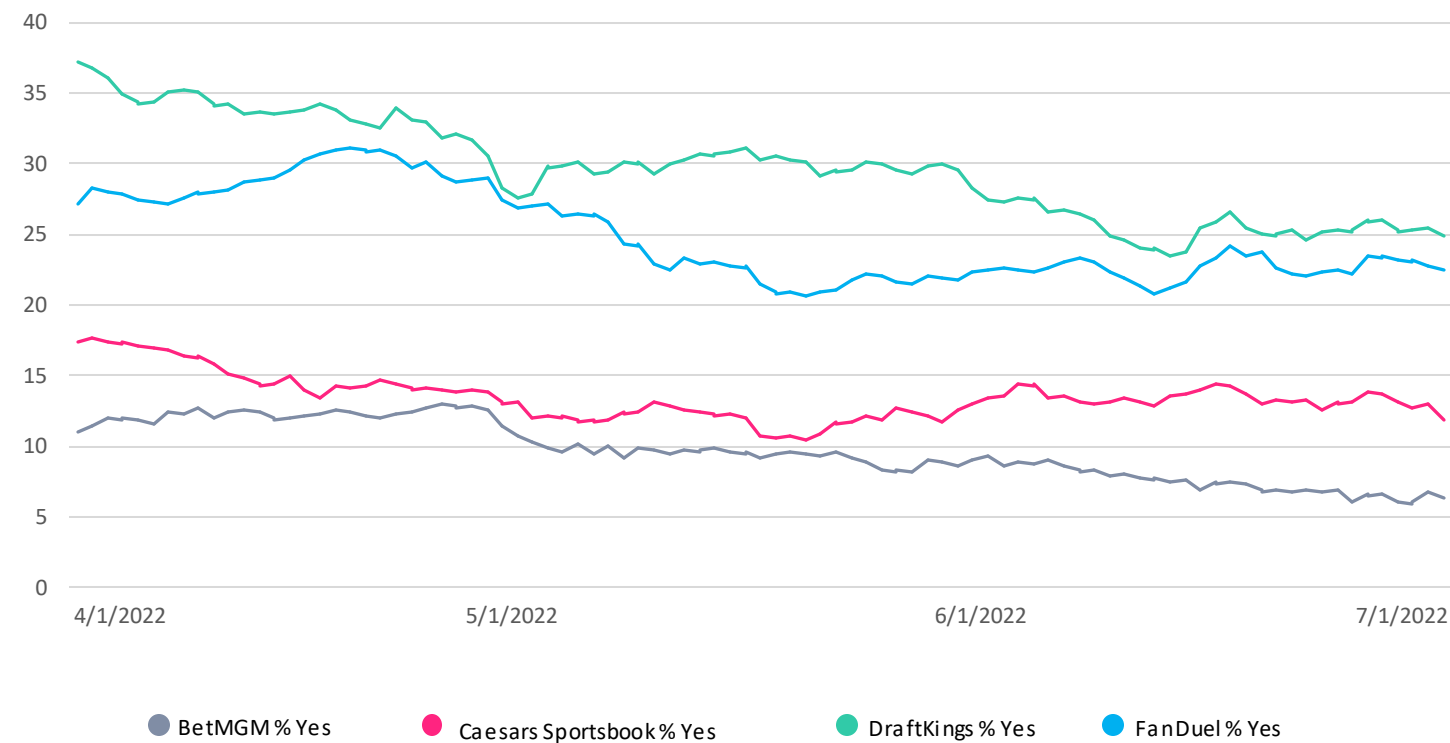
Legalized US gambling States:  
Gambling in the next 30 days

In legal states we see the number of regular gamblers expecting to **bet online** is higher but so is expectation to be in a casino as well as play lottery.

Gambling in the next 30 days – Legal vs Non-legal states (Gamblers)



Ad-awareness Score – Apr 22 – Jun 22 – Legal Sates



Legalized US gambling States:  
Ad awareness scores

Ad awareness for DraftKings has fallen back considerably this quarter and is now only just ahead of FanDuel at around 25%. The differential between Caesars Sportsbook and BetMGM narrowed in April and May but BetMGM has slipped back through June.

# Example consumer profile: US NFL bettors





## Profile of NFL bettors

NFL bettors over-index in a variety of areas vs other sports bettors – outlined are some of their preferences and behavioral patterns.



Aged 45-64, Middle Income, more likely to live in Midwest region and have completed 4-year education



Buffalo Bills and Dallas Cowboys are their two favorite NFL teams



**43% vs 20%**

NFL bettors are likely to bet on a sporting event using online/app in the next 30 days



**31% vs 13%**

say they select an online provider based on having 'the best promotions' and **63% vs 47%** agree "I look out for special promotions that give away free bets"



**62% vs 34%**

regularly place single bets (i.e. to win)



**72% vs 40%**

use TV (live) to watch/follow sport and 77% vs 55% agree that "when I've placed a bet on a sport it makes it more interesting to watch"



**42% vs 16%**

NFL bettors over-index hugely for already having an account with DraftKings



**66% vs 48%**

used Facebook within the last month and 41% vs 24% used Instagram

Who's your most critical audience right now?





# YouGov Global Gambling Profiles



## Global Gambling Profiles

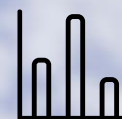
Optimize your strategy with game-changing intelligence on gambling audiences

This report draws on data from **YouGov Global Gambling Profiles**, our gambling audience intelligence tool that can identify trends and cross-analyze gambling data against key metrics, including demographics, media consumption, sports and teams followed, and more.

Unlock insights including what consumers gamble on, where they gamble, bets placed, types of bets, frequency, spend, style, attitudes and behaviors. Explore specific topics such as buying tickets for prize draws, spread betting, and political betting. Create custom variables to draw out and highlight the data most important to you.

Connect your research to YouGov's market-leading depth and breadth of Living Consumer Intelligence for even more granular information on your customer's behavior. Run your own research today.

Explore more Gambling data today >



### Fresh data

Data collected and updated on a monthly basis



### Data consistency

Measure trends across a consistent set of gambling metrics



### Global reach

24 markets





# Thank you

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