

YouGov®

Gambling attitudes & activities

October 2023

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Foreword

As the world deals with higher inflation and interest rates amid the continued recovery from COVID-19's impact, YouGov has examined the current state of gambling attitudes and activities across the globe.

Set against the backdrop of an ever-changing landscape of gambling legislation, this report focuses on the North American market but benchmarks gambling behaviors from 23 countries. The findings underscore an emergence of younger gamblers in the US, whose views differ from the more traditional punter.

We also note the widespread public concern surrounding the industry which must be carefully considered, especially in North America as online markets move into their next stages of development.

[Learn more about this data](#)



Oliver Rowe

Global Sector Head,
Leisure & Entertainment, YouGov

Who is YouGov?

One of the world's leading market research and data companies



24+

million registered
panel members



40+

million surveys
carried out yearly



15+

years of tracking
thousands of brands



100s

data points held
about each panellist

YouGov is the most quoted market research source in the world

(Meltwater 2022)

A few of our clients



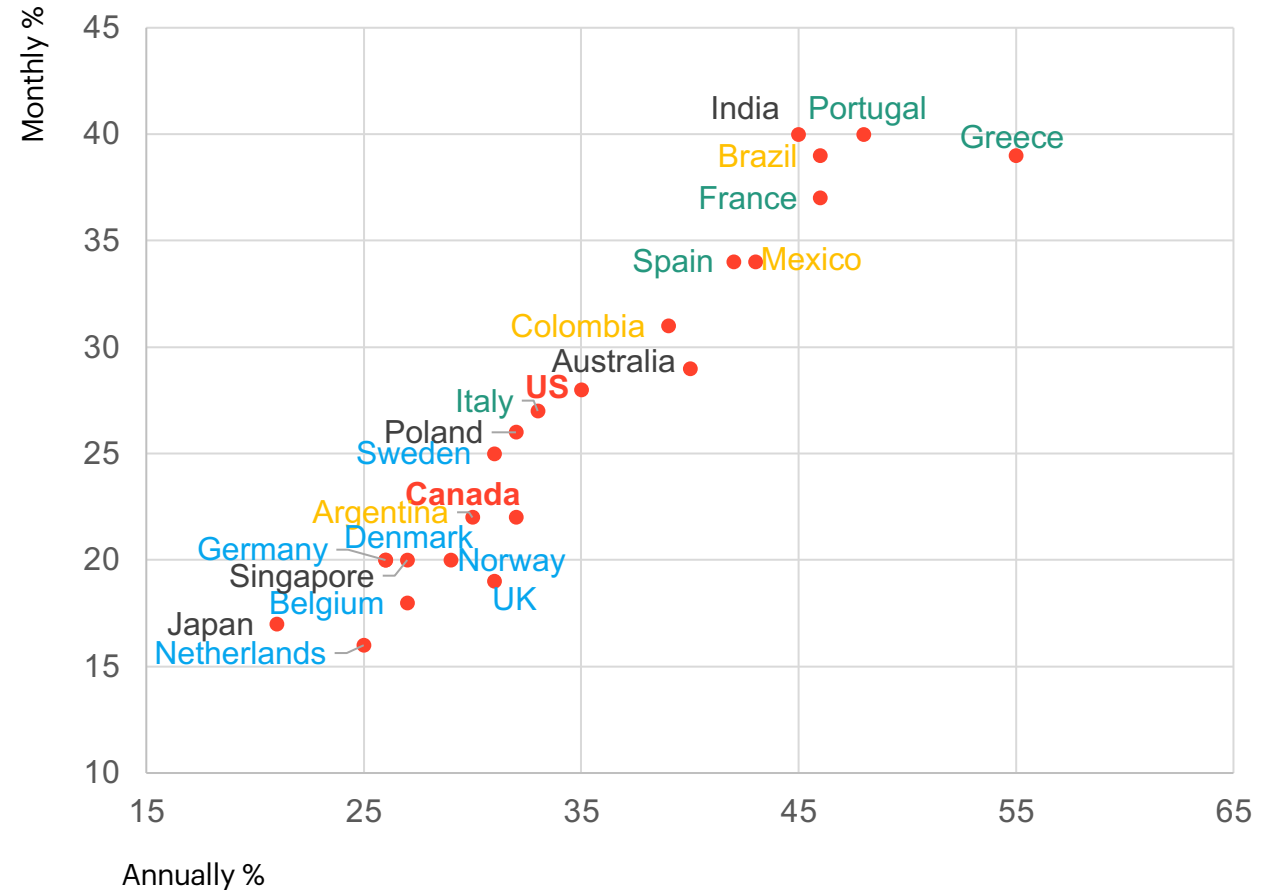
Gambling market overview



Number of bettors each year & month

- Gambling engagement differs vastly across countries
- Southern Europeans (green) are more likely to bet than those in the north (blue)
- Brazil and Mexico lead in the Americas, with US well ahead of Canada

% of population betting annually and monthly (excl lottery) - April 2023



Q. How frequently do you gamble/place a bet either online or offline, excluding lottery

Sample: online April 2023, approx 1,000 or 2,000 respondents aged 18+ per country

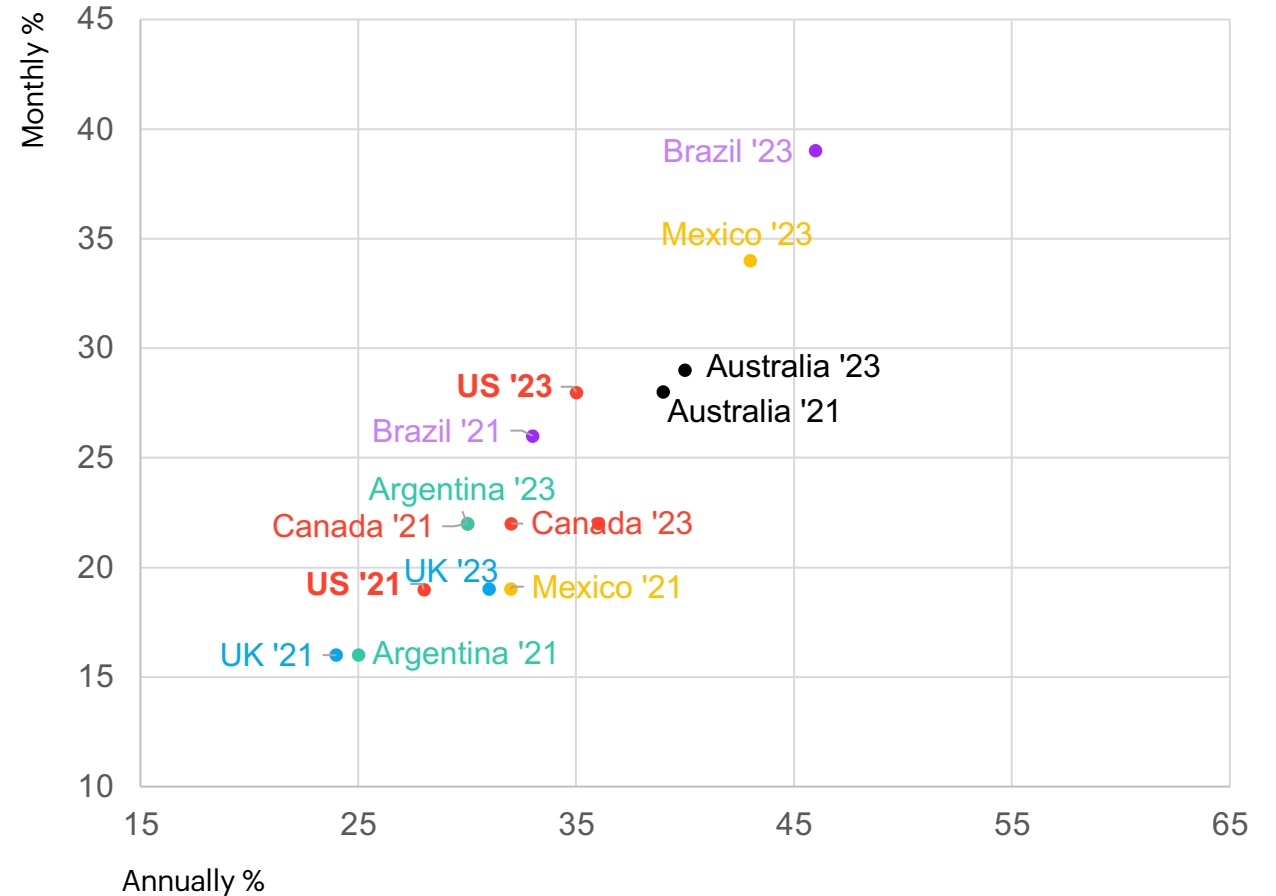
Number of bettors each year & month 2021-2023

- Many countries are at a three-year high for the number of annual and monthly bettors
- The Americas, including US, Brazil, Argentina and Mexico show some of the greatest growth
- Italy and France show the most growth in Europe

Q. How frequently do you gamble/place a bet either online or offline, excluding lottery

Sample: online April 2021 & April 2023, approx 1,000 or 2,000 respondents per country

% of population betting annually and monthly (excl lottery) - April 2023



State & Province level growth

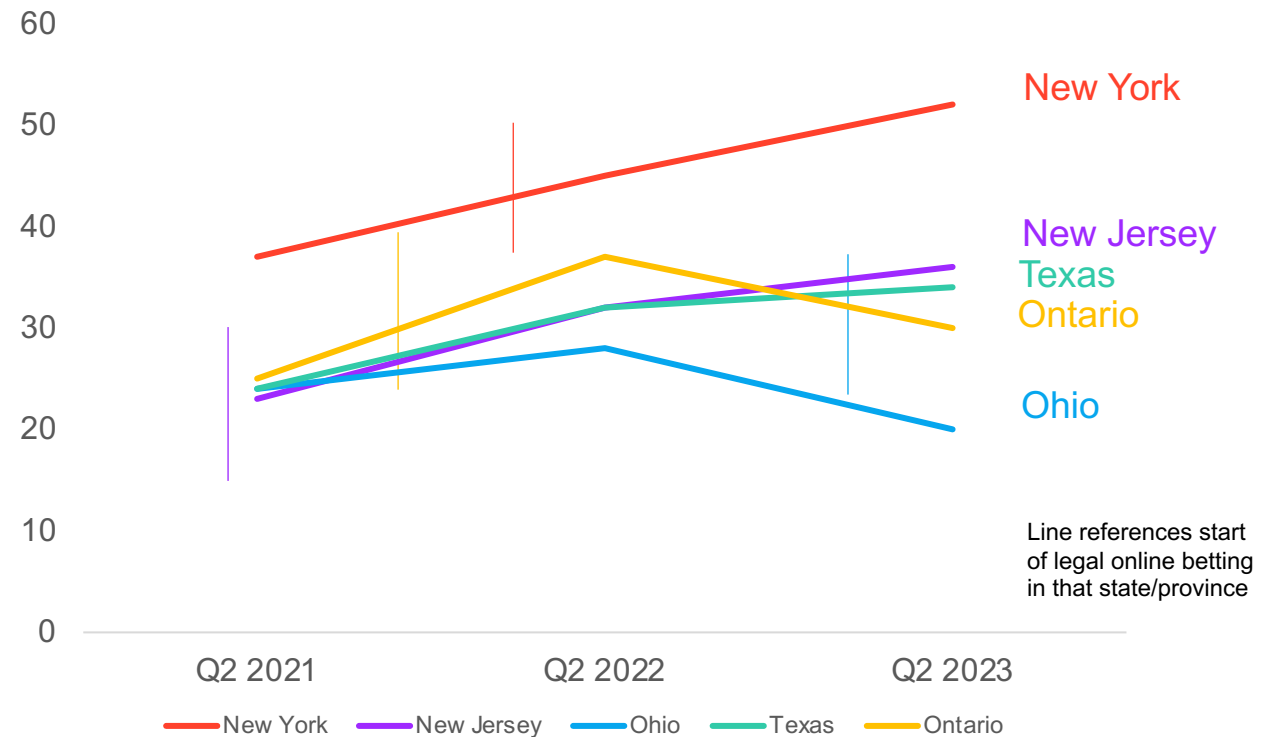
- Strong growth in NY – 52% have bet in past 12 months, 46% online
- NJ is perhaps still benefitting from post-Covid land-based growth
- Ontario has dropped, with numbers perhaps depressed by the end of the grey market
- Ohio held its peak in Q1 2023 after online began but then dropped in Q2

Q. How often, if at all, do you place a bet offline or online excluding lottery?

Sample: online, minimum sizes 119 NJ, 415 NY, 183 OH, 487 TX, 1,106 ON

Get in touch for other states and provinces.

% of population betting annually offline or online (excl lottery)



Offline vs online

- Most countries, including the US & Canada, have higher gambling participation offline than online
- These scores include activities some may not consider gambling, such as prize draws and fantasy sports for money
- Mature markets like the UK show that online can exceed offline

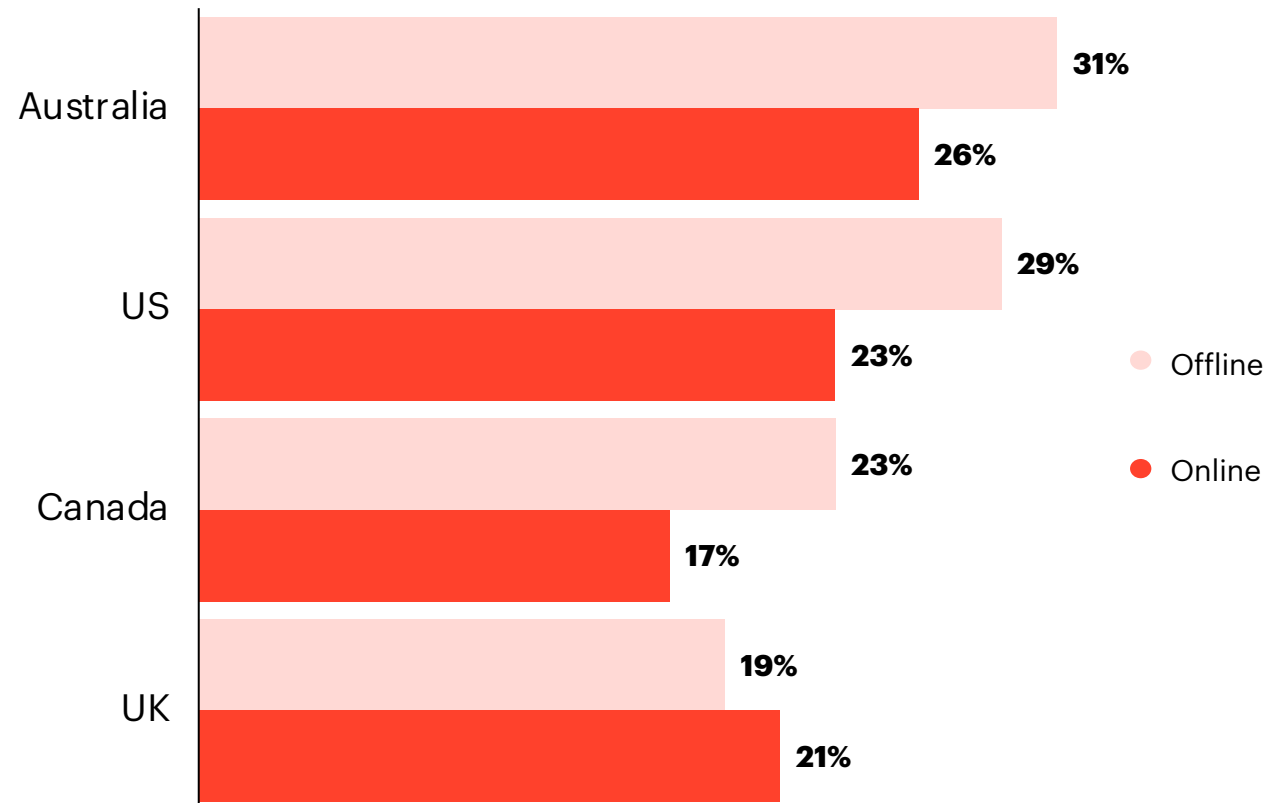
[Get in touch for more markets >](#)

Q. Which of the following have you done in past 12 months?

Results may be higher than data shown earlier as question asks about specific 'for money' gambling activities rather than general gambling frequency

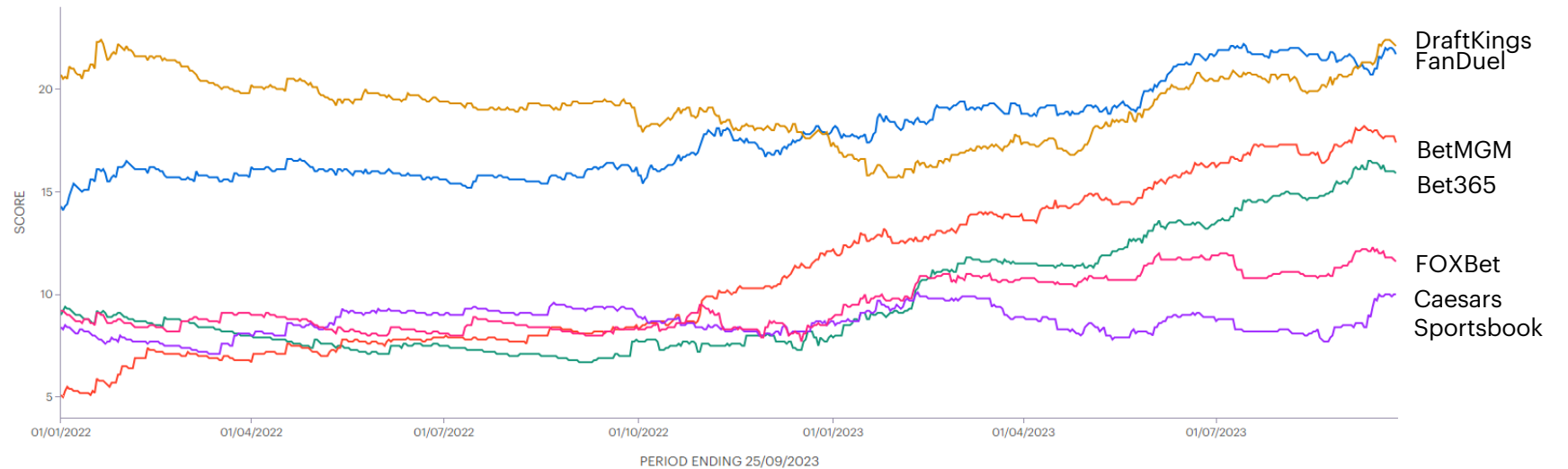
Sample: online August 2022 - July 2023, approx. 24,000 respondents per country

% of population betting offline or online annually (excl lottery/scratch) – Aug 2022 - July 2023



Who's winning?

Brand consideration among American online sports/casino bettors



Source: YouGov BrandIndex

Metrics ▼ Chart Options ▼ Show data as LINE CHART OR BAR CH

Select analysis-wide metric

Index None	Buzz None	Impression None	Quality None	Value None	Reputation None	Satisfaction None	Recommend None
Awareness None	Attention None	Ad Awareness None	WOM Exposure None	Consideration % Yes	Purchase Intent None	Current Custo... None	Former Custom... None


Who's betting in the US & CA?

- In US under 35-year-old males are the critical audience offline and online.
- Older offline bettors are less likely to have moved online
- There is rather less focus on under 35s in Canada

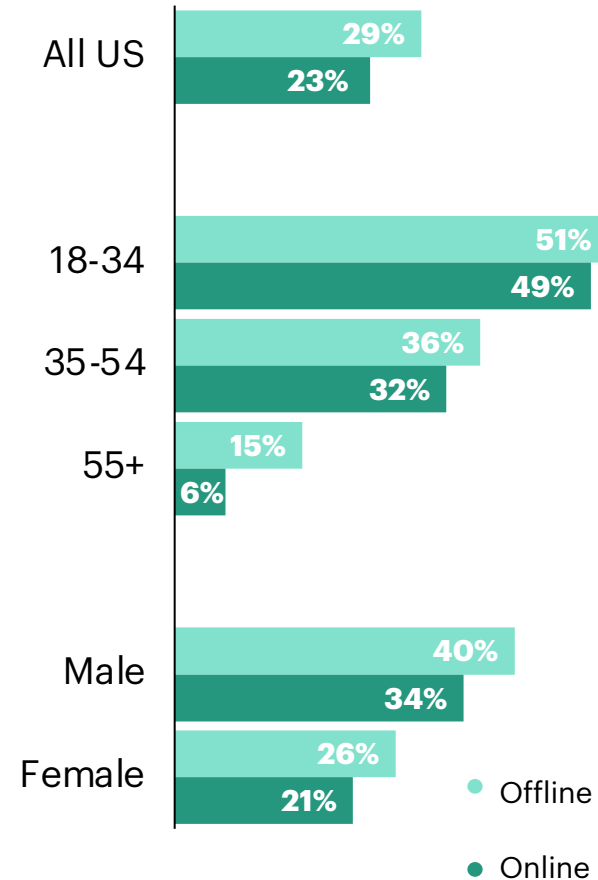
Q. Which of the following have you done in past 12 months?


Results may be higher than data shown earlier as question asks about specific 'for money' gambling activities rather than general gambling frequency

Sample: online August 2022 – July 2023, US 24,563 respondents, CA 18,011

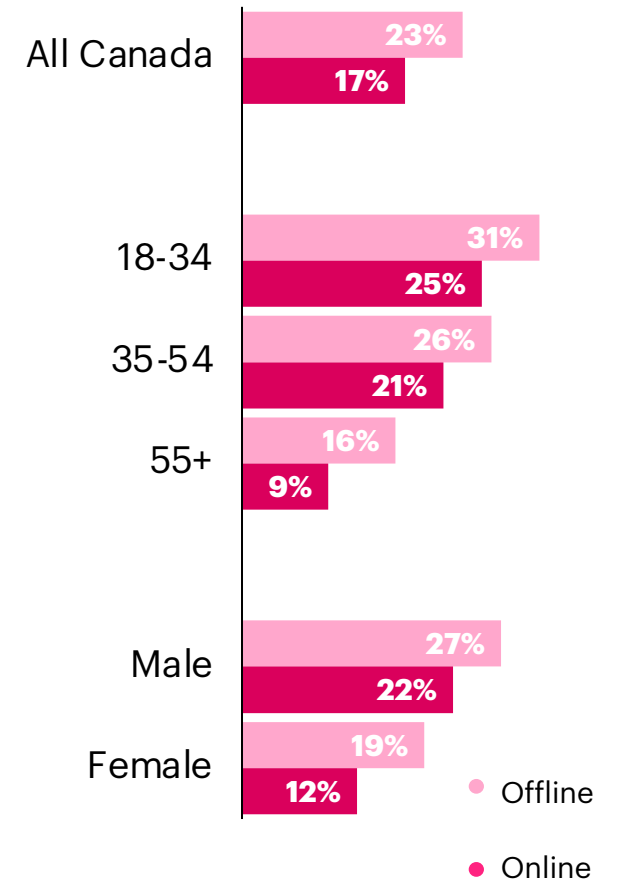
United States 

% of each group betting offline or online annually (excl lottery)



Canada 

% of each group betting offline or online annually (excl lottery)

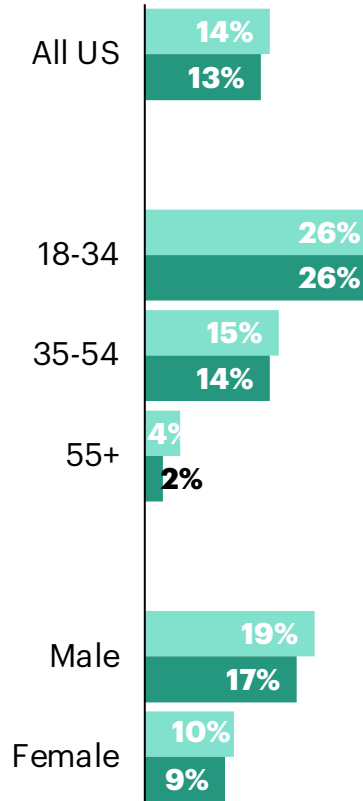


United States 

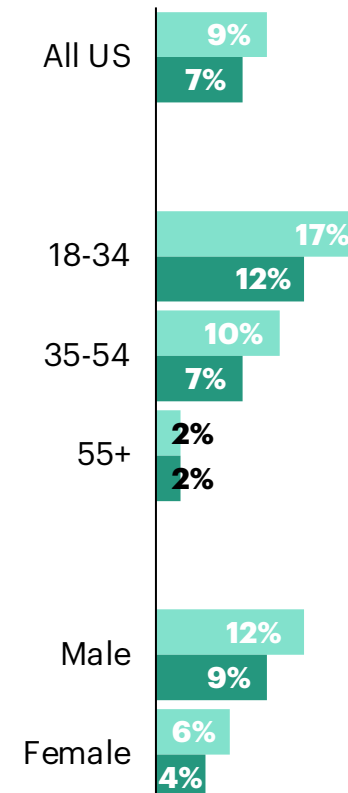
Who's playing what? (US)

- Casino table games/poker are as popular online as offline
- Sports has more offline bettors
- Online slots haven't converted many older or female offline players but they have brought in more younger players

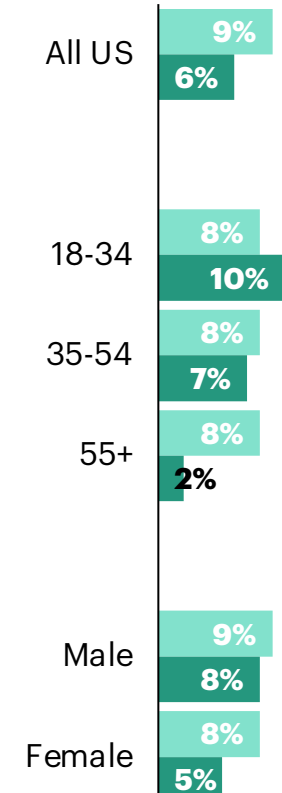
% betting on casino table games*/poker annually



% annual sports bettors (excl fantasy, esports)



% playing slots annually



● Offline ● Online

Q. Which of the following have you done in past 12 months?

*online includes playing live casino game shows

Sample: online August 2022 - July 2023, 24,563 respondents


US & CA sports betting market

- NFL and NBA are far more popular than other sports among monthly sports bettors in the US
- Esports outpacing more traditional sports betting like horse racing and boxing in the US
- Hockey leads in Canada

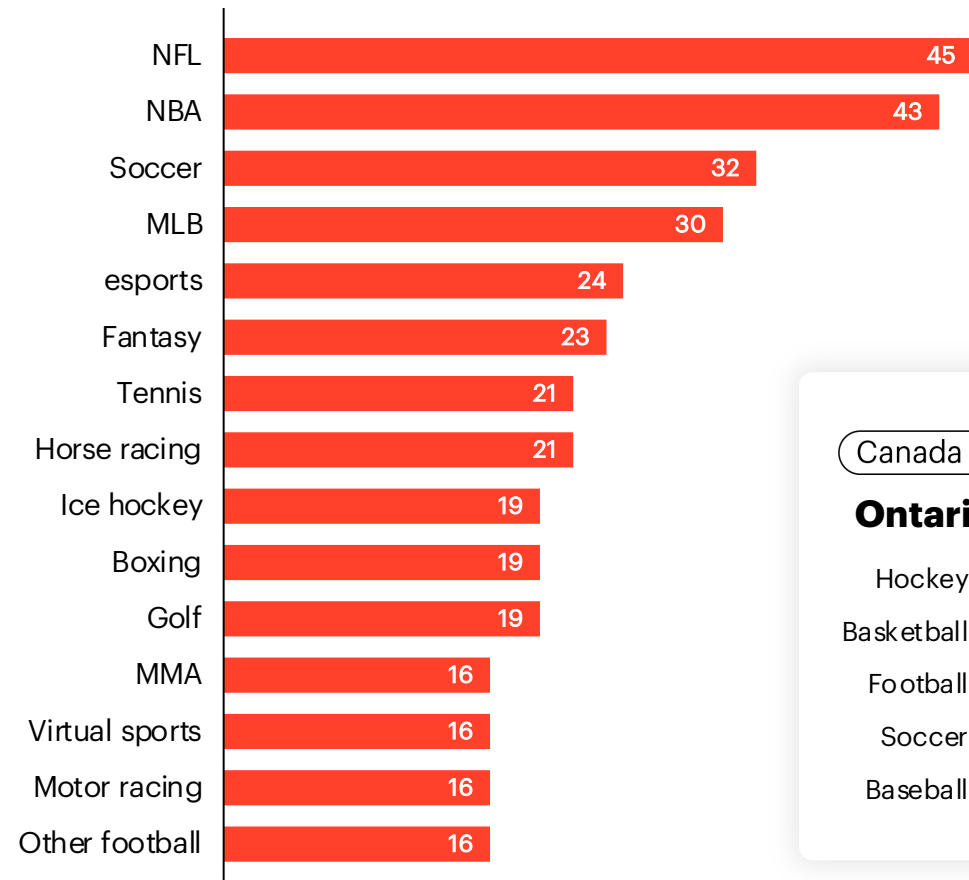
[Request spend data >](#)


Q. Which of the following have you bet on in past 12 months?

Sample: online August 2022 – July 2023, US 24,563 respondents, CA 18,011

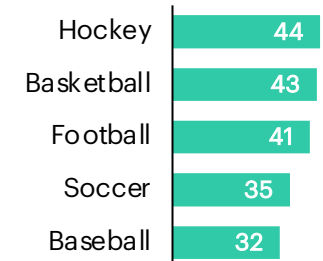
United States 

Sports bet on in past 12 months by 'monthly' US sports bettors (%)



Canada 

Ontario

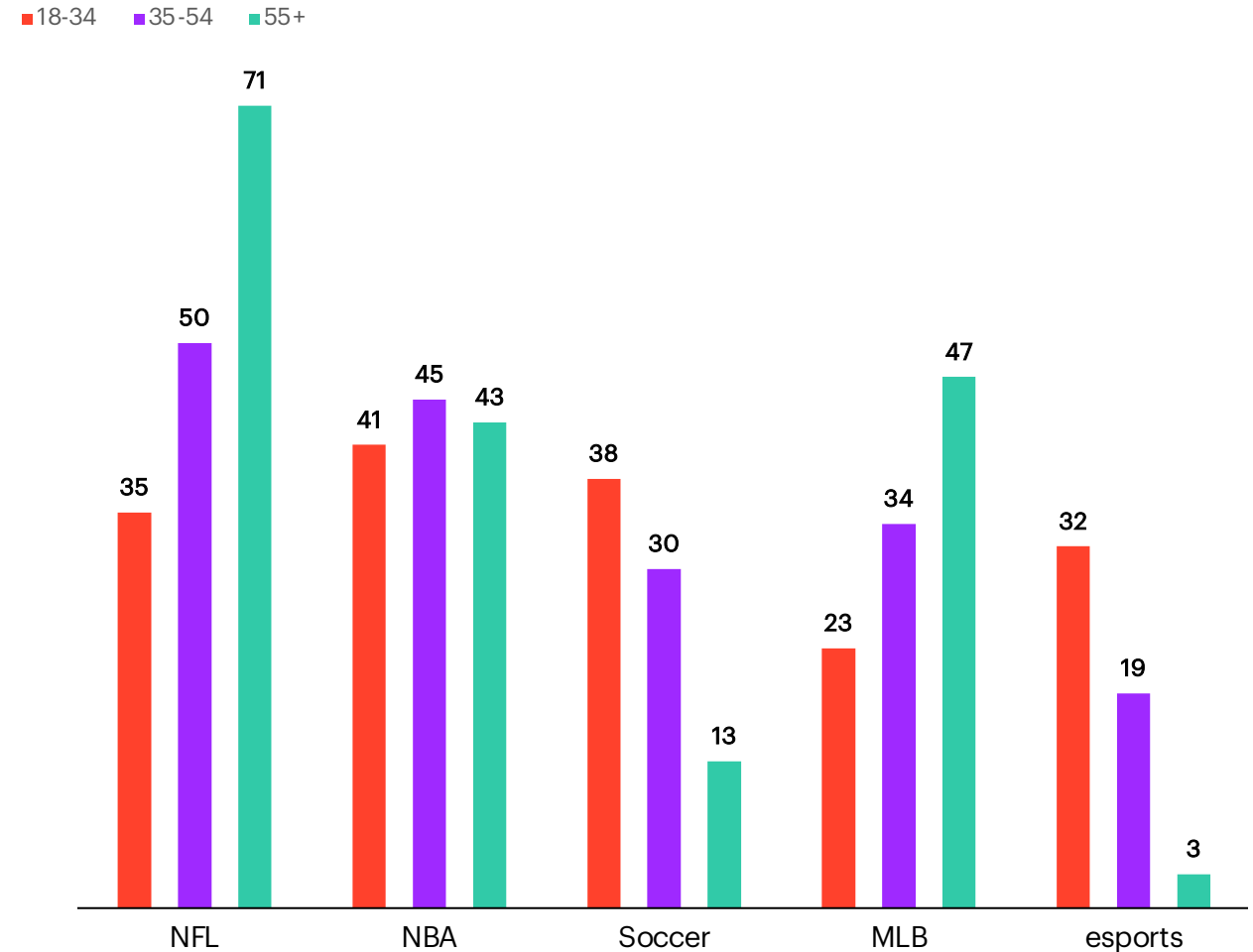


United States 

Top 5 sports bet on by age - US

- Regular sports bettors of different ages have very different sports they prefer to bet on
- Those 55+ focus on NFL, MLB, NBA and racing.
- Under 35s bet across many more sports and have comparatively much less interest in MLB and racing. Soccer is their second favorite sport.

Sports bet on in past 12 months by 'monthly' US sports bettors (%)



Q. Which of the following have you bet on in past 12 months?

Sample: YouGov online August 2022 - July 2023, base of 24,563 US respondents

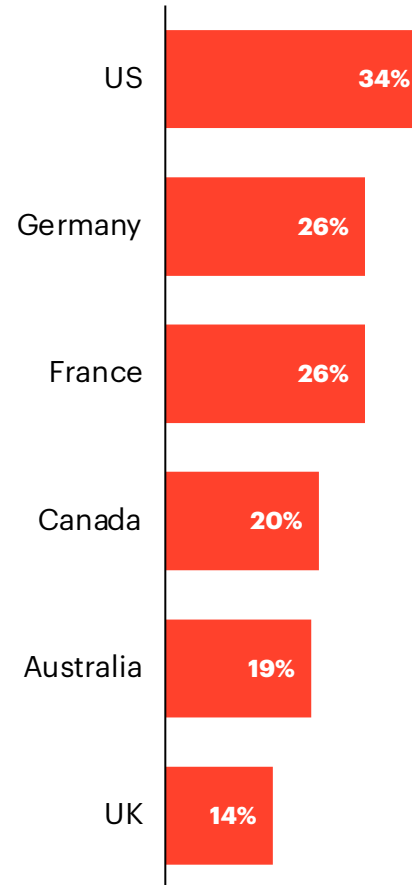
Interest in using payment apps & crypto among weekly sports bettors

- Payment apps are more popular among US sports bettors than those in other countries
- Betting with crypto has much higher appeal in US (73% of sports weekly bettors) and low appeal in UK (14%)
- Betting with crypto appeals significantly more to younger Americans

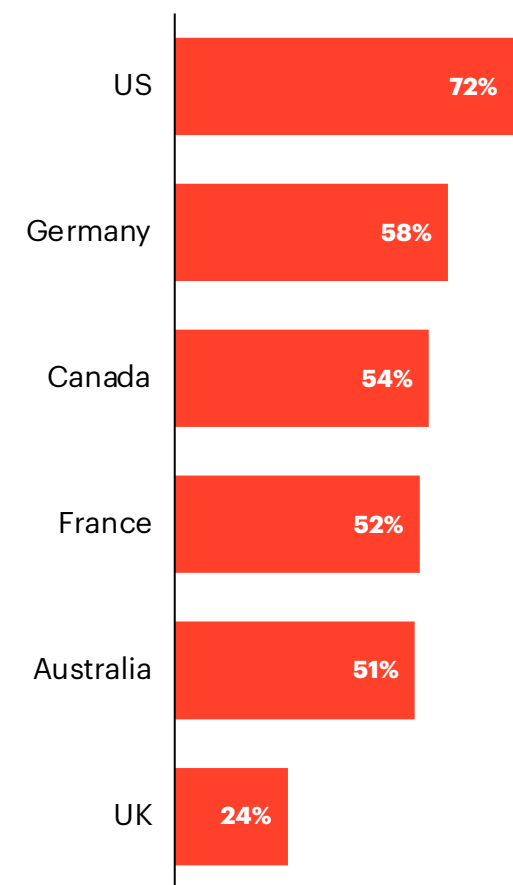
Q. Which if any of the following statements about gambling accounts apply to you?

Sample: online August 2023, respondents US 128, AU 129, CA 95, UK 170, FR 161, DE 236

% of weekly sports bettors "prefer to move money in/out of betting account using payment app rather than bank"



% of weekly sports bettors "Interested in placing bets using cryptocurrency"



United States 

Interest in AI to help betting - US

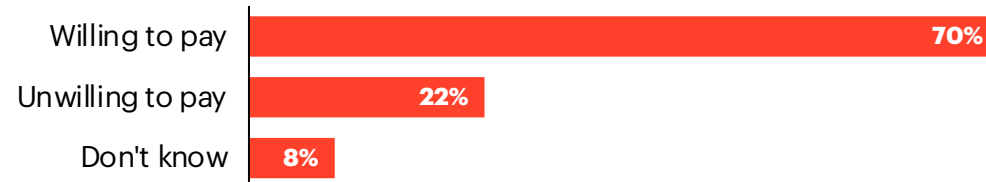
- Majority of online bettors claim they would be willing to pay for AI help
- Many though do expect their provider to offer it free, or to provide a free trial period

Q. How willing or unwilling would you be to pay for an artificial intelligence (AI) powered tool that was available to assist you in making more transparent and informed decisions (e.g., analyzing the form of football players/teams, horses, poker players, etc.)?

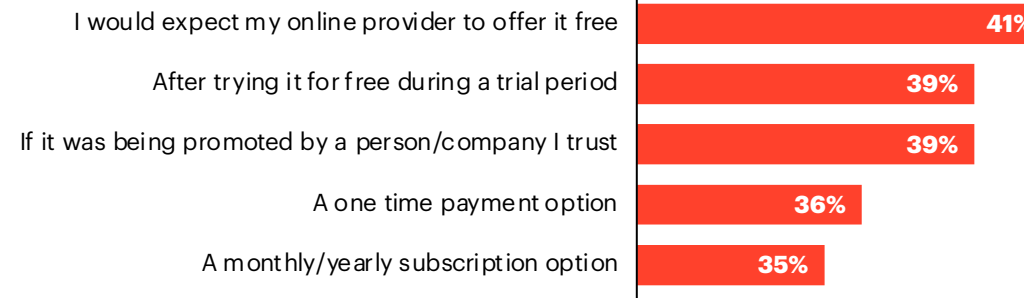
Q. Which, if any, of the following ways would motivate you to pay for this service?

Sample: US monthly bettors, interviewed online April 2023 – sample size of 286 monthly bettors & 199 willing to pay

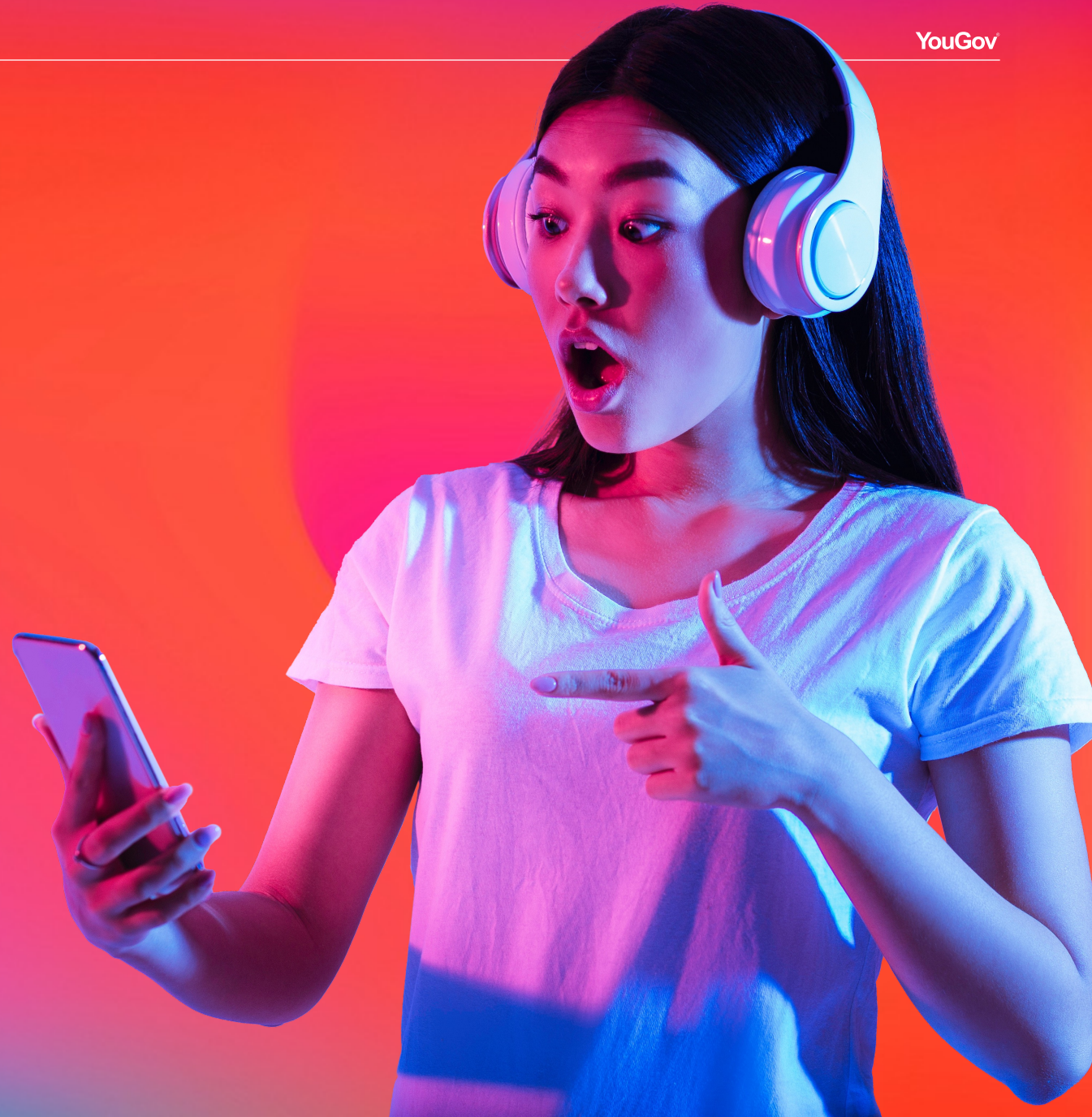
% of monthly bettors willing/unwilling to pay for an AI tool to help make more transparent & informed decisions



What monthly bettors say would motivate them to pay for an AI service (%)



Gambling attitudes



Anticipating regulatory battles

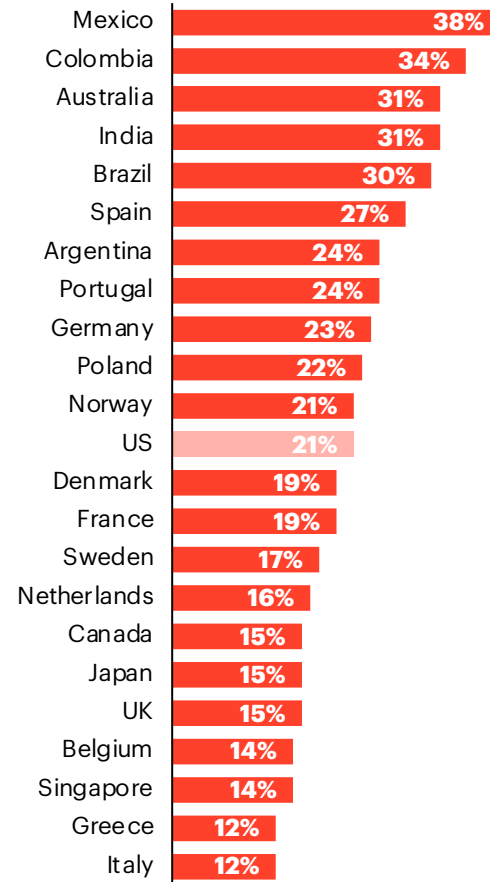
- Australia polarized on gambling: 31% 'enjoy' vs 36% want it 'illegal'
- Just 21% of Americans agree, and 15% of Canadians & Brits, that they 'really enjoy gambling'
- 26% in US who agree gambling should be illegal is up from 20% in April 2021; 40% disagree
- Under 35s are more likely to agree

[Explore filtered data >](#)

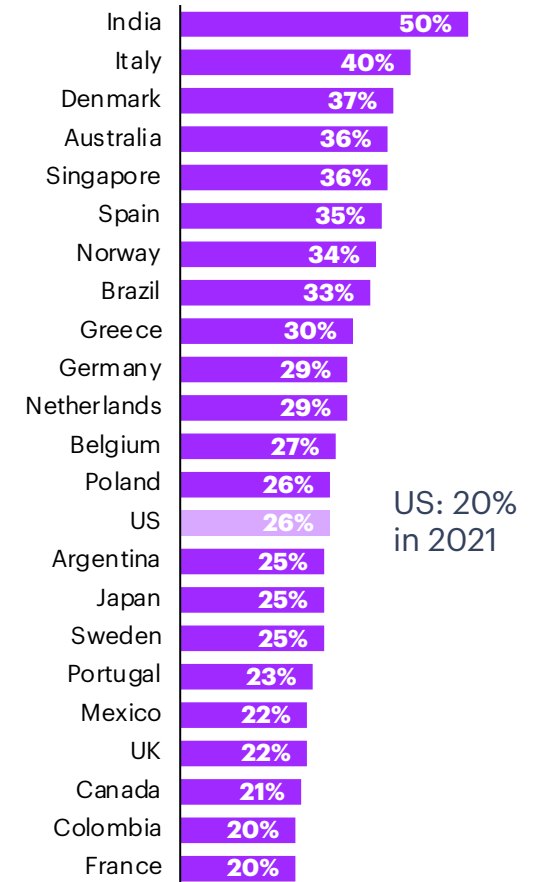
Q. To what extent do you agree or disagree with these statements

Sample: online April 2023, approx 1,000 or 2,000 respondents per country

% of population "I really enjoy gambling"



% of population "Gambling should be illegal"



US: 20%
in 2021

Possible regulations

Advertising

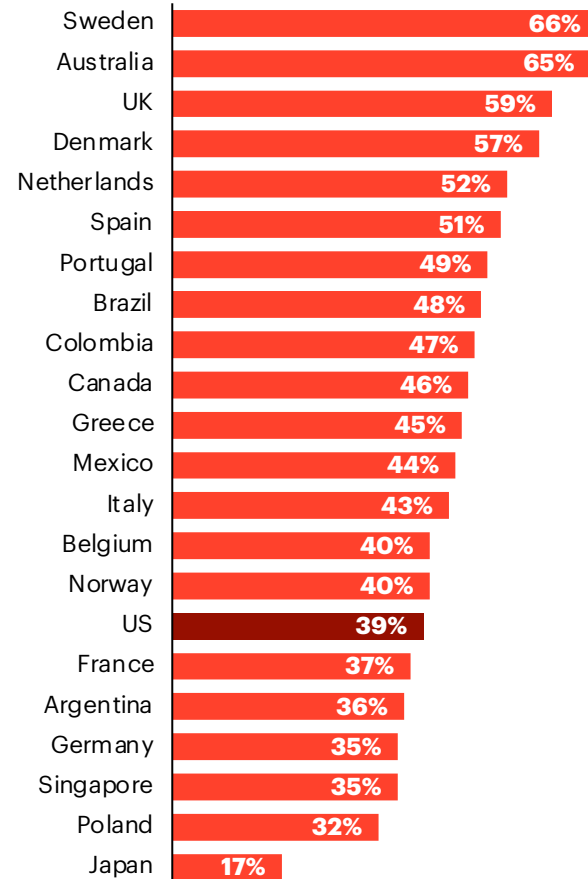
- 44% of Americans in fully legal states say they see too many betting ads vs 33% in other states
- In mature markets including UK and Australia a majority agree

Protections for gamblers

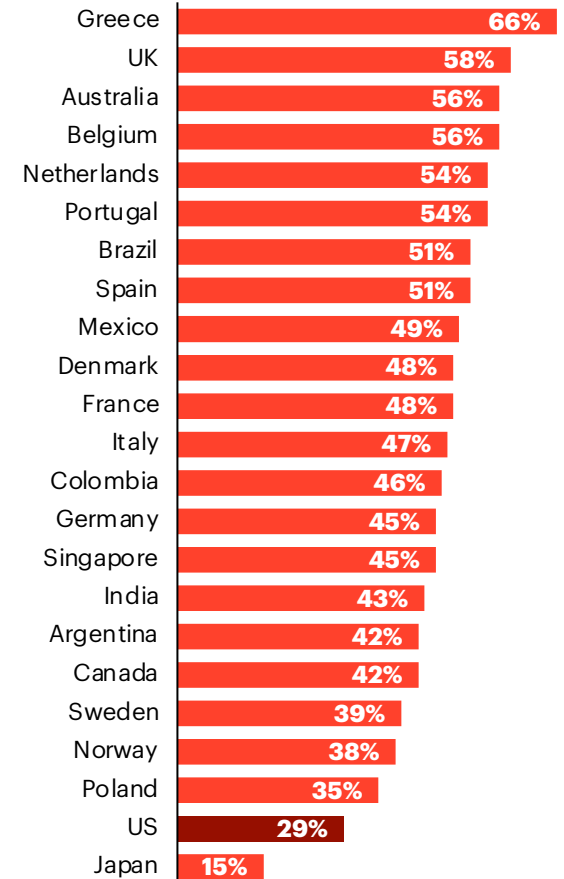
- Protections less desired in US (29%) but much higher in other markets
- Younger Americans are slightly more likely to want protections (35%)

[Explore filtered data >](#)

% of population "I see too much betting advertising"



% of population "Government should do more to protect gamblers"



Q. To what extent do you agree or disagree with these statements

Sample: online April 2023, approx 1,000 or 2,000 respondents per country

United States 

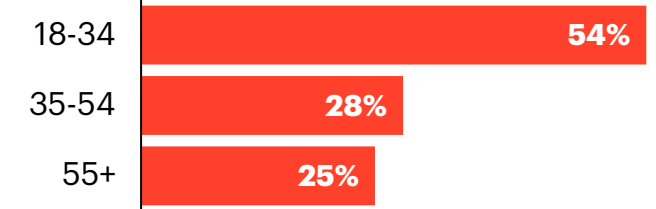
Variations in US sports betting attitudes by age

- Younger sports bettors see themselves as gamers (who want to win) and not casino-goers
- Younger sports bettors are also more concerned about problem play and feel they personally should gamble less (and they stake the most by far)

% agree "I consider myself a gamer"



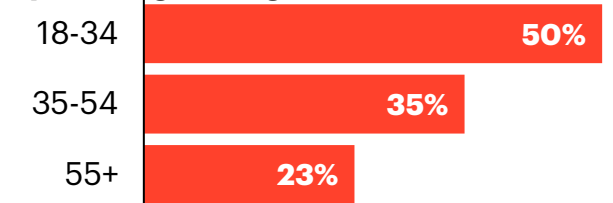
% agree "Casinos are depressing"



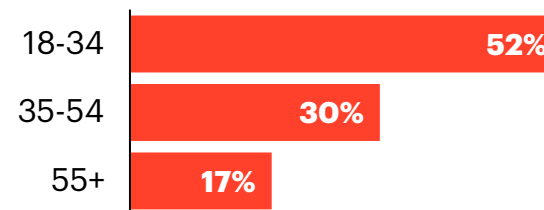
% agree "Sports betting is addictive"



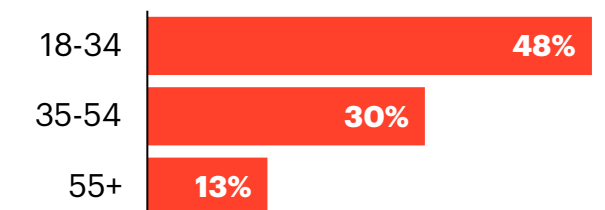
% agree "I'm very worried about the issue of problem gambling"



% agree "If I don't win in games then I don't have fun"



% agree "I really should gamble less than I do"



Q. To what extent do you agree or disagree with these statements

Sample from YouGov Profiles: online past 12 months, 759 US respondents who have bet on sports in past 12 months



Incentives & Loyalty

United States 

Americans have multiple accounts

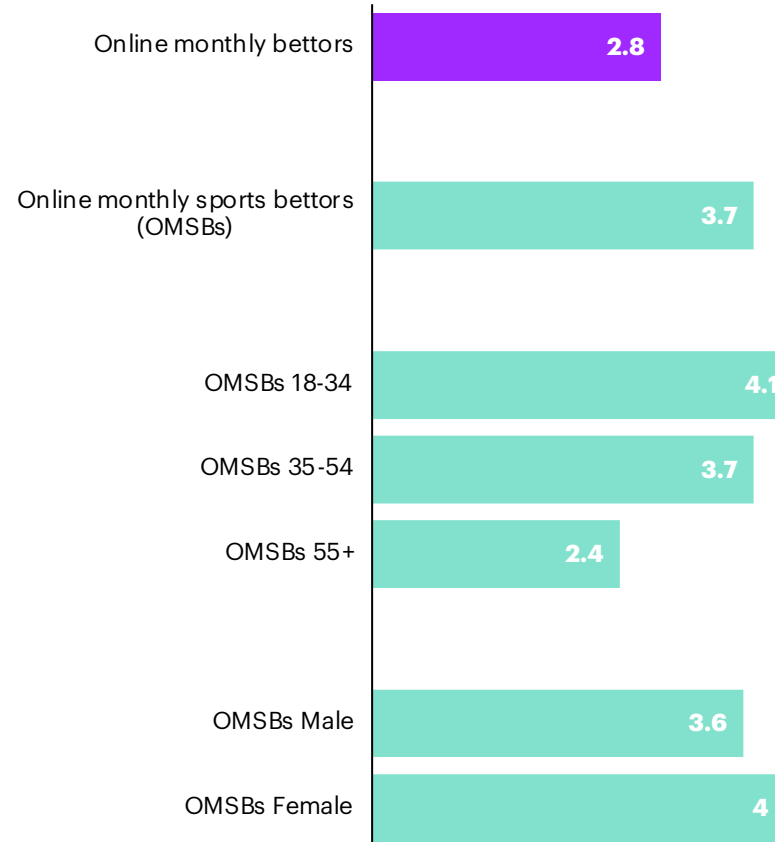
- On average regular US online bettors have around three accounts, rising to above four among sports bettors
- Younger online sports bettors have more accounts
- Around two thirds of these accounts are used each week

Q. Which of these companies, if any, do you have an online account with?
Please select all that apply

Mean number derived from list of 22 brands + Other

Sample: online August 2022 - July23, 17,504 respondents (filtering to 21+ possible)

Number of online accounts monthly online bettors have open



Around 2/3 of accounts are used each week.

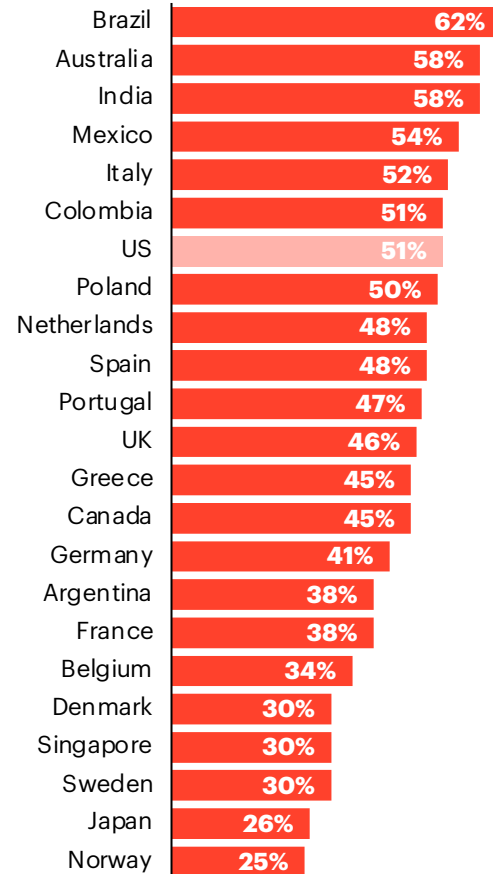
Free bets, play & promos expected but not required

- Half (51%) of all US monthly gamblers look out for free bets, rising to 68% of monthly online sports bettors & 65% slots players
- Two fifths (42%) play free prediction games
- But only 1 in 7 (15%) in US say having the best promotions drives their selection of a gambling provider

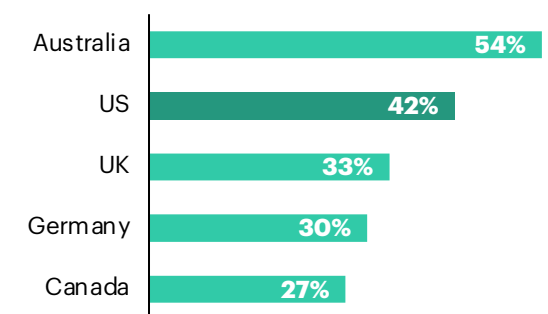
Gamblers defined as all who have bet in past 30 days, excluding only lottery

Sample: online April 2023, approx 1,000 or 2,000 respondents aged 18+ per country

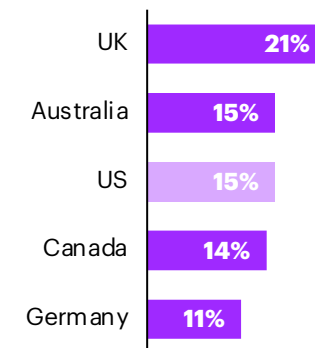
% of gamblers agree: "I look out for special promotions giving away free bets"



% of gamblers agree: "I regularly enter free-to-play sports prediction games"



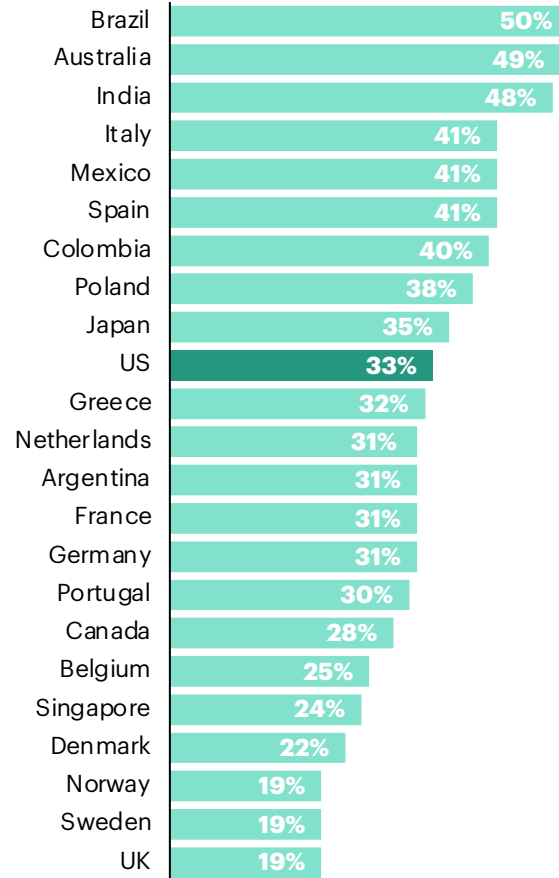
% of gamblers agree; important for selecting provider: "Has the best promotions"



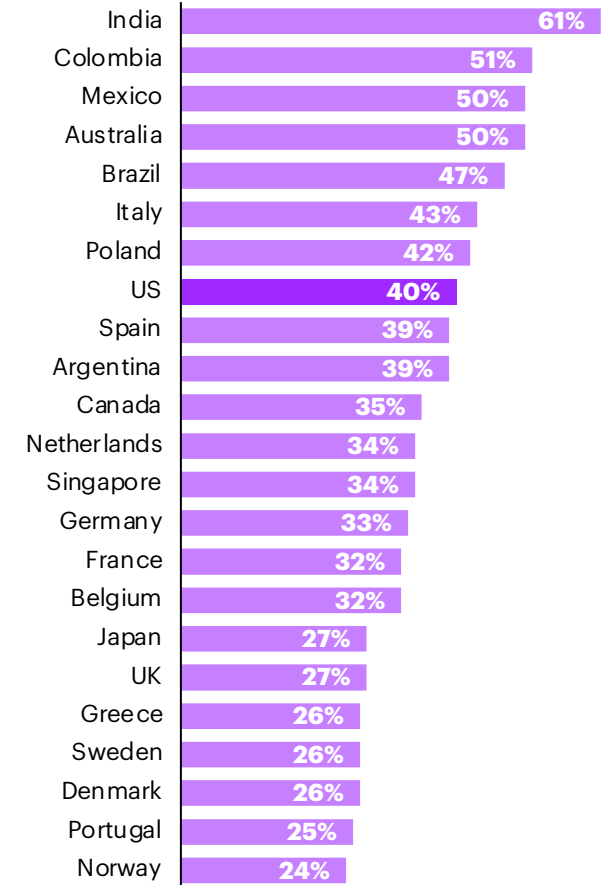
Importance of odds & loyalty

- A third (33%) of US monthly gamblers claim to use specialist websites to get the best odds
- Over a third (40%) claim to only use sites that offer loyalty schemes

% of gamblers agree: "I use specialist websites to get the best odds"



% of gamblers agree: "I only use sites that offer loyalty schemes"



Gamblers defined as all who have bet in past 30 days, excluding only lottery

Sample: online April 2023, approx 1,000 or 2,000 respondents aged 18+ per country

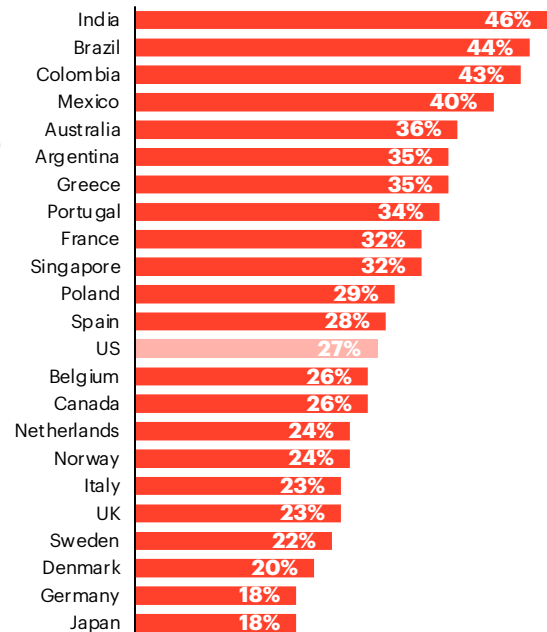
Sports engagement through betting



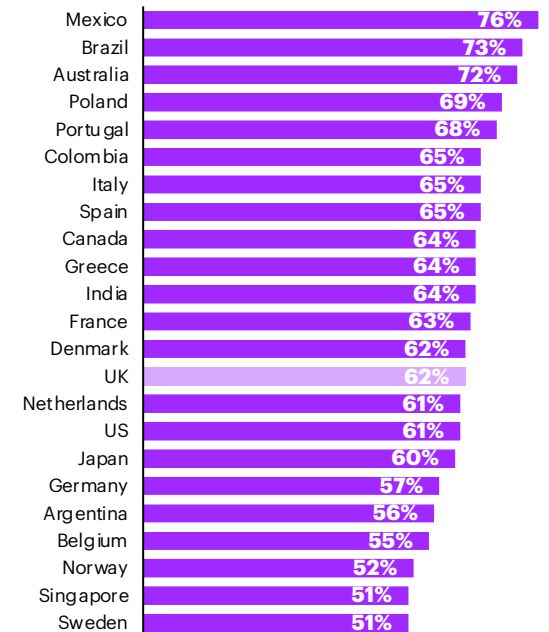
Market opportunities for sports betting

A quarter (27%) of the US public says that betting on a game makes them more likely to watch it, rising to three fifths (61%) among US monthly sports bettors.

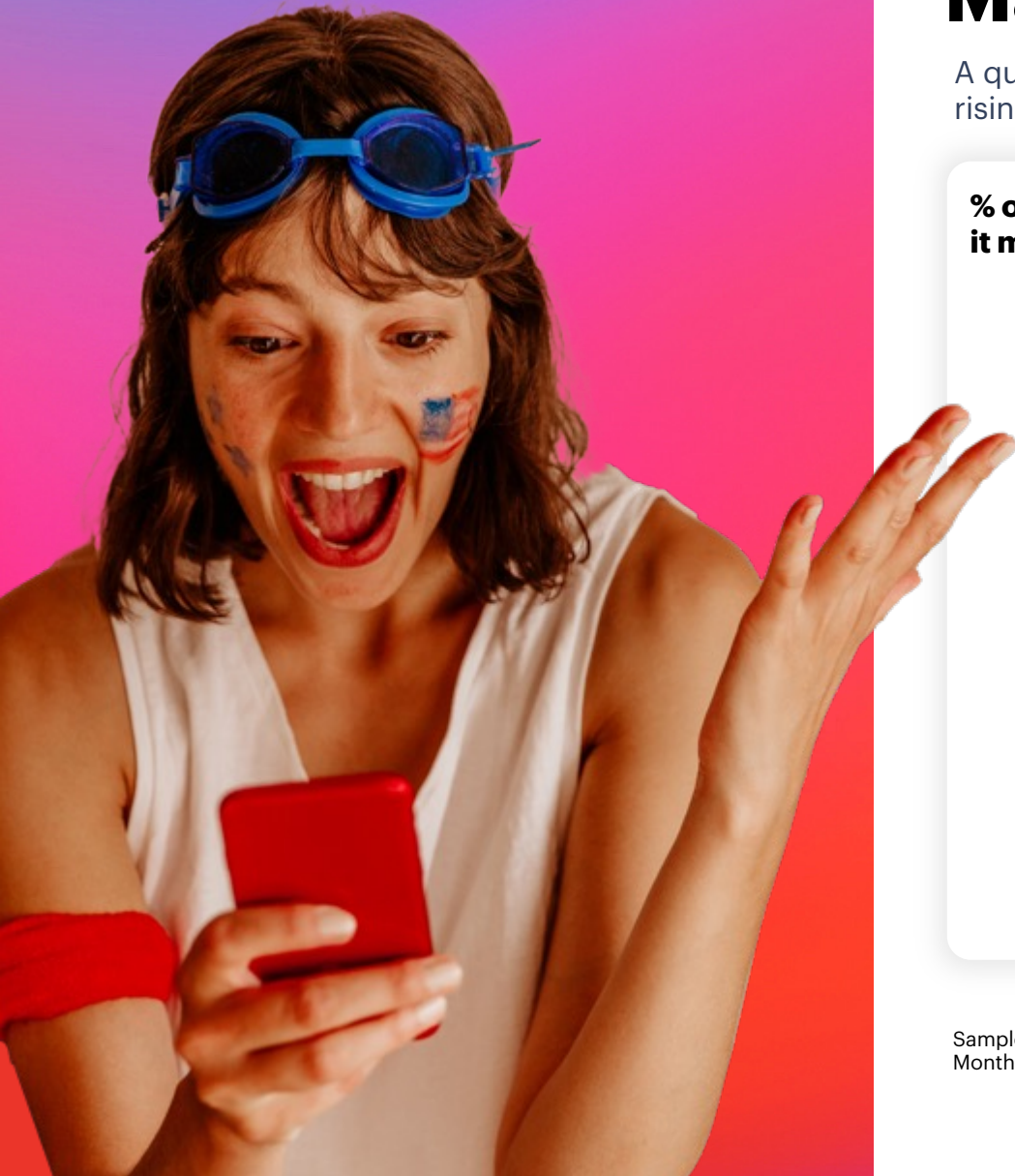
% of public who agree: When I bet on sport it makes me more likely to watch the game



% of monthly sports bettors who agree: When I bet on sport it makes me more likely to watch the game



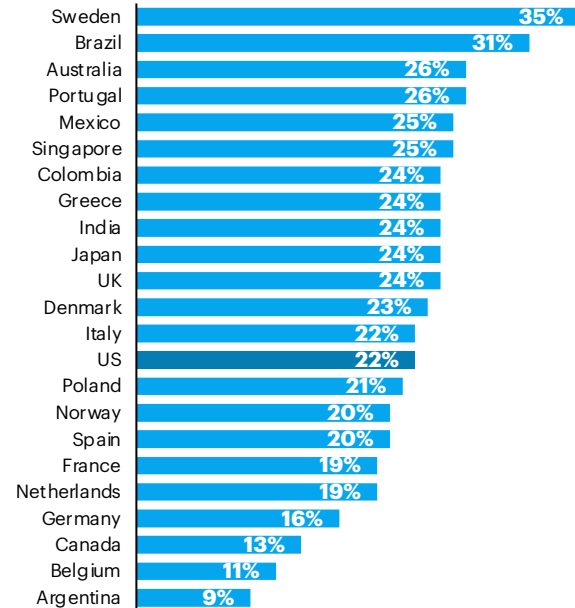
Sample: online April 2023, approx 1,000 or 2,000 respondents aged 18+ per country (Nat rep), Monthly sports bettors approx. 120-500 respondents per country



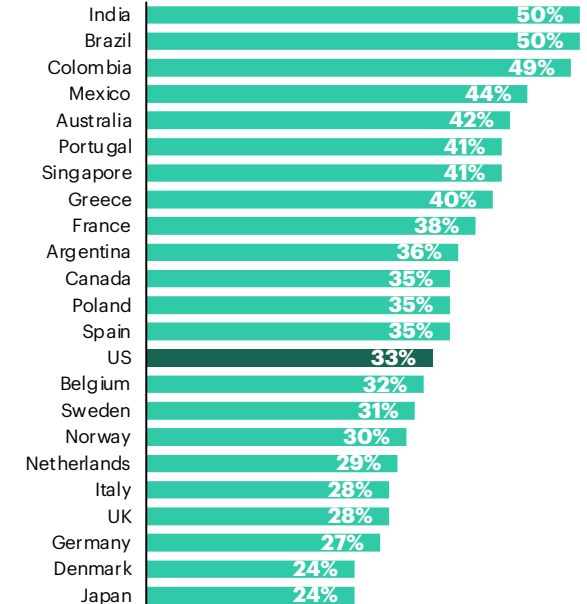
Sports fans betting behavior

While only a quarter (22%) of US sports fans bet on sport annually, a third (33%) agree that when they do bet they are more likely to watch the game.

% of sports fans who bet on sports in last 12 months



% of sports fans who agree: When I bet on sport it makes me more likely to watch the game



Sports fans defined as all members of public who say they actively follow at least one sport
Sample size: sports fans approx. 595-1804 per country

Data in this presentation is drawn from various YouGov sources

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YouGov Global Gambling Profiles

GGP is a syndicated survey available on subscription covering gambling data in 24 countries.

It regularly surveys members of YouGov's consumer panels which make up the world's largest connect survey dataset.

Data for the US is collected monthly, including 2,000 nat rep sample of the general public and a 1,000 boost of monthly gamblers.

YouGov BrandIndex

Always-on brand tracker collecting attitudes daily on over 2,000 brands in the US alone. Runs in 50+ countries.

Includes many casino, sportsbook and other related brands.

YouGov Profiles

Always-on syndicated data tool collecting brand, media, lifestyle, demographic and attitudinal data for over 350,000 Americans. Runs in 50+ countries.

Topics include gambling which can be analysed by factors as diverse as favourite athletes and teams, to streaming subscriptions.

Ad hoc studies

YouGov regularly runs ad hoc surveys about gambling, asked of nationally representative samples. Some of these findings are included in this presentation.

Thank you

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