

ONLINE SPORTS BETTING TRENDS

USA 2021



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PERFORMANCE

KEY INSIGHTS

THE FUTURE OF LEGAL SPORTS BETTING IN THE UNITED STATES LOOKS BRIGHT IN 2021 AND BEYOND

As legalization of sports betting spreads across the country and bettors look for legal sports betting options, online sportsbooks have been increasingly gaining popularity in the United States.



ONLINE SPORTS BETTING SAW SUSTAINED GROWTH IN 2020 DESPITE COVID RELATED SUSPENSIONS OF LIVE SPORTS EARLY IN THE YEAR.

Legal sports betting garnered an all-time high of \$1.5 billion in revenue in 2020, up 69% year-over-year as reported by the American Gaming Association.



FANDUEL & DRAFTKINGS SPORTSBOOKS ARE THE BIGGEST PLAYERS IN THE MARKET; BOTH BRANDS REMAIN IN CLOSE COMPETITION.

Fanduel Sportsbook leads iOS downloads and DraftKings Sportsbook leads iOS active usage. Fanduel ranked #1 in the sports category in the days leading up to the 2021 Super Bowl.



ONLINE BETTING AUDIENCES IN THE UNITED STATES ARE ADVENTUROUS AND WILLING TO TAKE RISKS FOR FINANCIAL BENEFIT.*

[*Click here to read disclaimer](#)

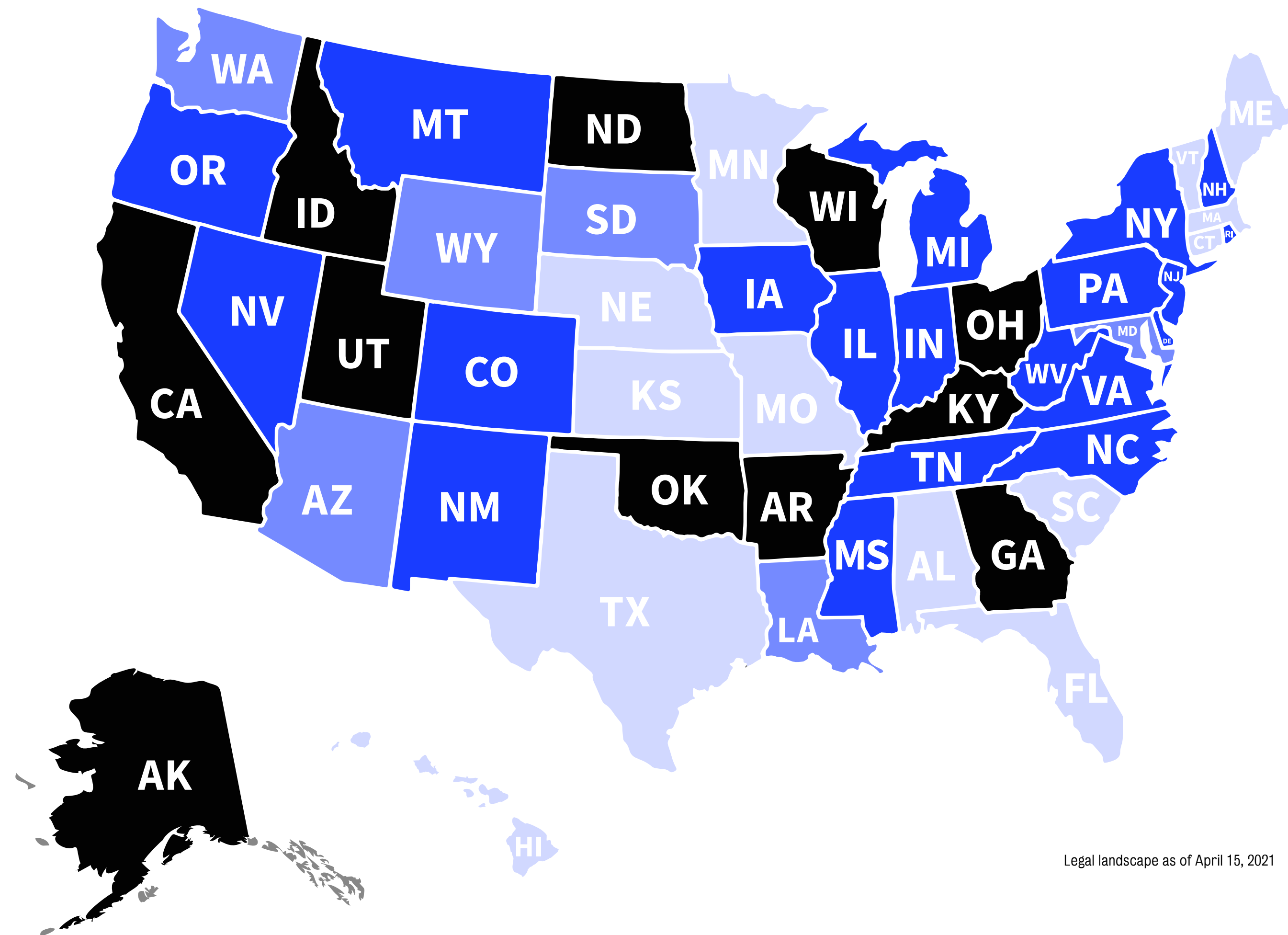
The majority of American bettors are young males who belong to high-income segments. Soccer and football are the most followed sports, and the NFL and NBA are the most followed sports leagues among them.

SPORTS BETTING LEGALIZATION IN THE UNITED STATES CONTINUES TO GROW IN 2021

SPORTS BETTING ACTIVITY

- States where there's no legislation/
dead legislation
- States where single-game sports betting is
legally offered to consumers through retail and/
or online sportsbooks (21 states + DC)
- States that have authorized sports betting
but are not yet operational (6 states)
- Jurisdictions where bills to legalize single-game
sports betting have been pre-filed/introduced in
the state legislature or where a voter referendum
is scheduled as of 2021 (13 states)

39% OF ADULT AMERICANS ARE EITHER CURRENT OR POTENTIAL SPORTS BETTORS



Legal landscape as of April 15, 2021

AMERICANS EMBRACE ONLINE SPORTSBOOKS. SPORTS BETTING CONTRIBUTES TO INCREASED ATTENTION AMONG AUDIENCES



Americans placed nearly \$35 billion on sports bets in 2020.



90% of all sports betting revenue comes from online sources.



DraftKings and FanDuel together comprise roughly 80% of the U.S. market.



Of Super Bowl bettors, 65% say it is important for themselves personally to use a legal, regulated sportsbook for their bets.



Super Bowl bettors said they will bet with online sportsbooks this year, up 63% YoY.



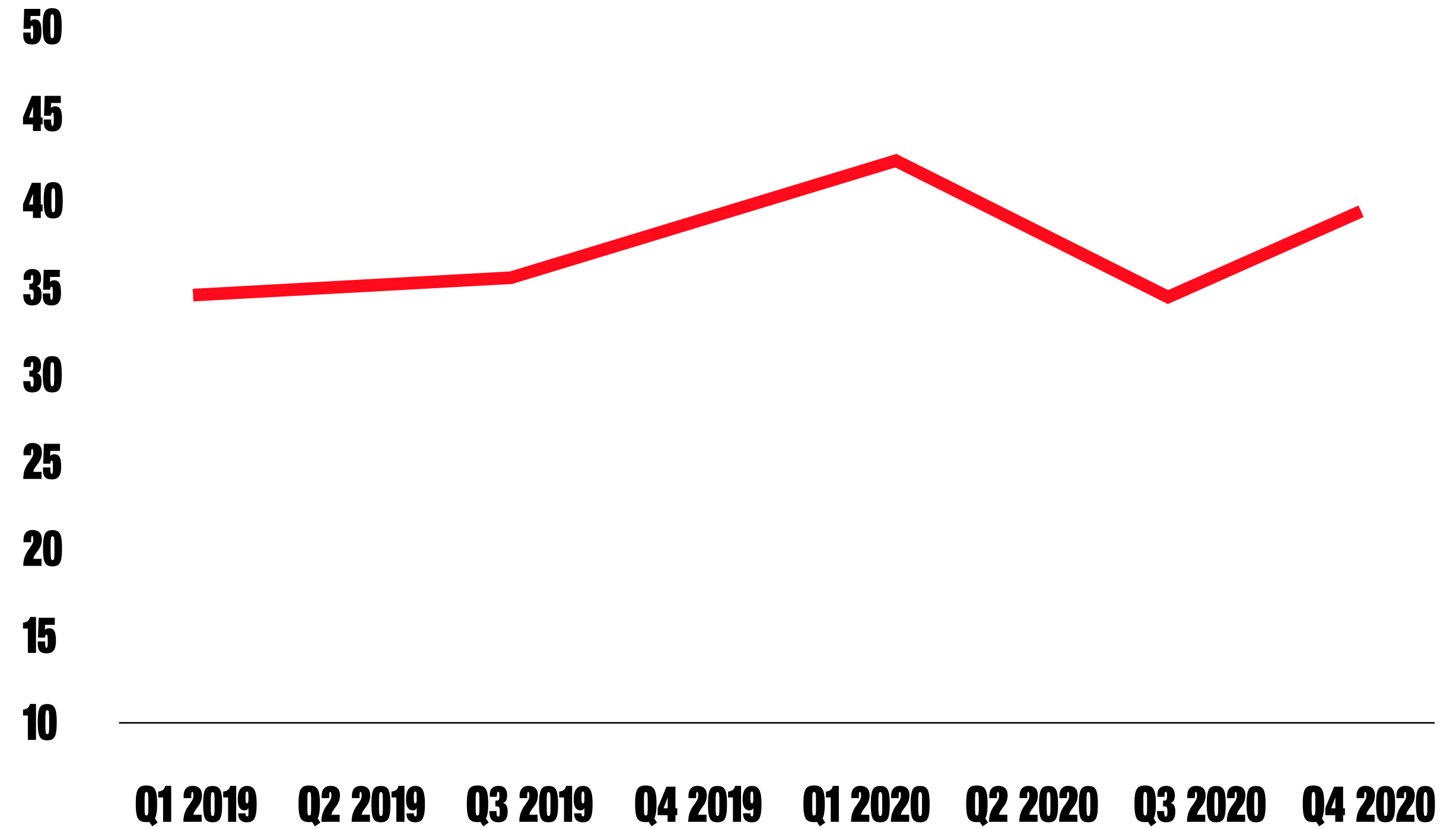
Americans said they will place a bet online during March Madness 2021, up 206% from 2019.



Of fans said they followed college basketball more closely this season, with 70% of those following more closely attributing their increased attention to the increased availability of sports betting.

**THE PANDEMIC
LED TO A
DECREASE IN
ONLINE BETTING
IN EARLY 2020.
HOWEVER THE
CATEGORY HAS
RECOVERED AND
HAS THRIVED
SINCE THEN**

% of audience that visited an online casino, gambling, betting or lottery services



1.5 BILLION

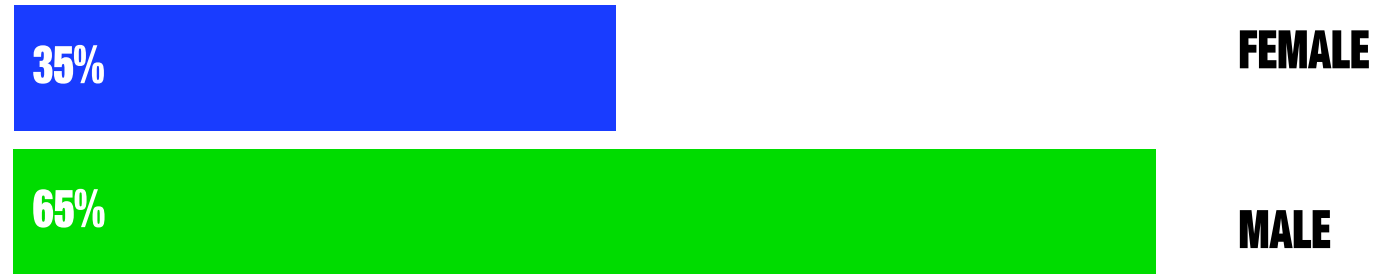
Legal sports betting revenue in 2020

69% 

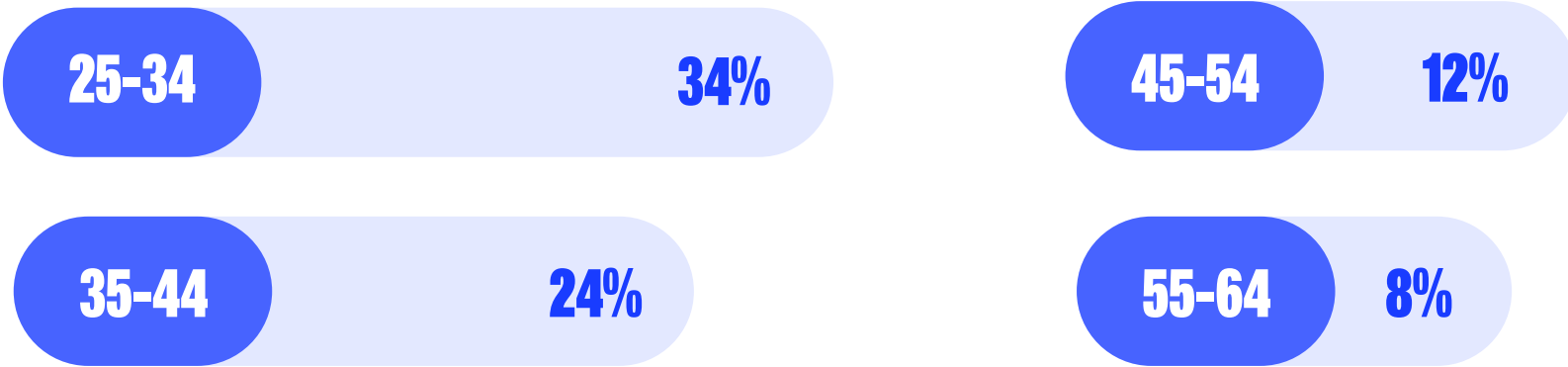
YoY increase in legal sports betting revenue 2020

MAJORITY OF BETTORS ARE MALE, YOUNG, HIGH INCOME, FULL TIME WORKERS

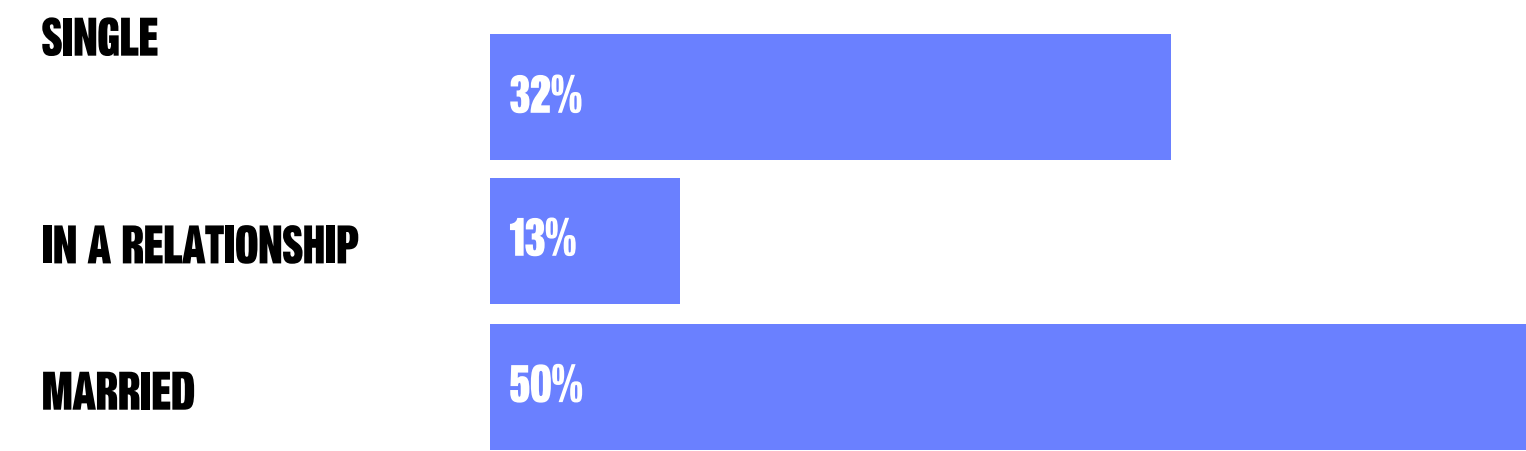
42.4M
AUDIENCE SIZE*



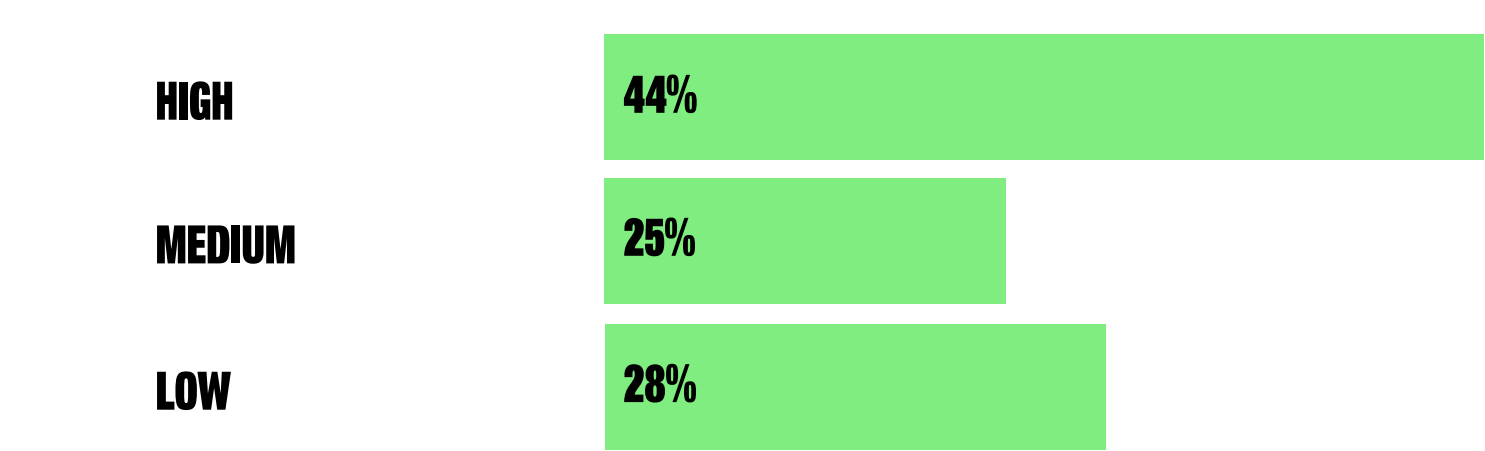
AGE GROUP



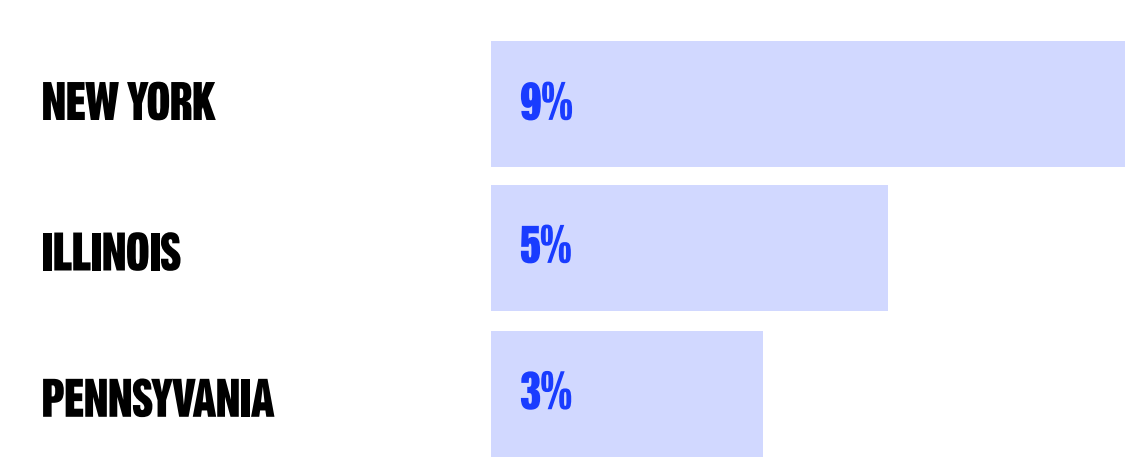
RELATIONSHIP STATUS



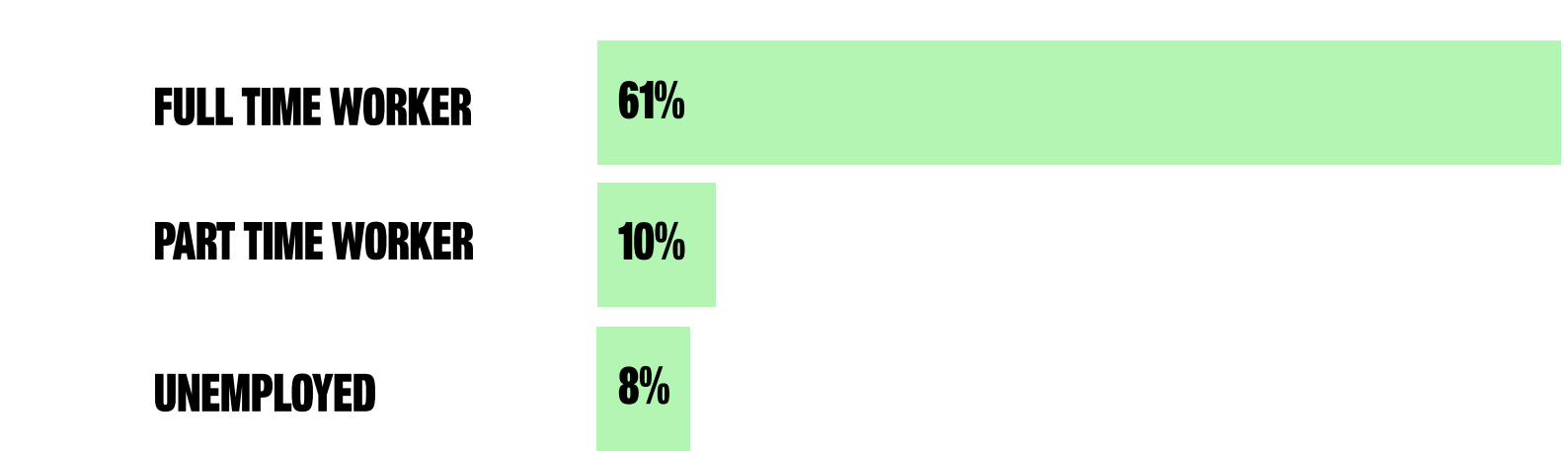
HOUSEHOLD INCOME



TOP STATES



EMPLOYMENT STATUS



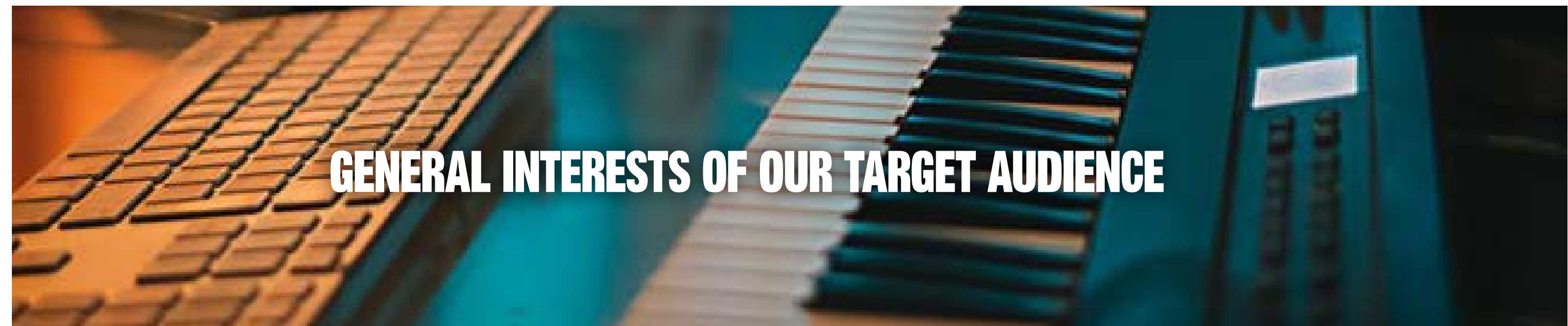
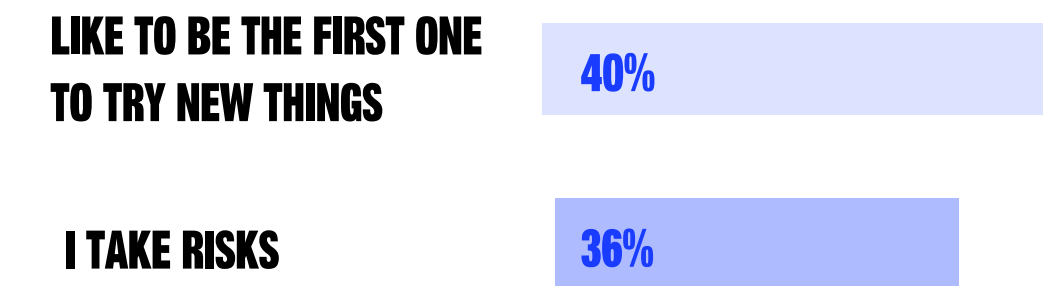
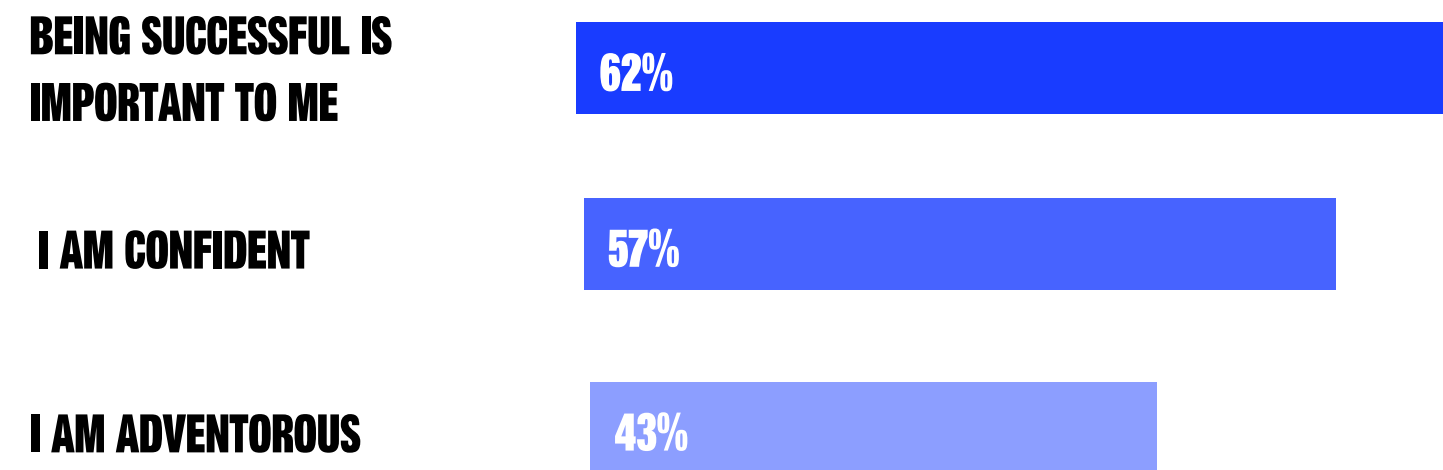
THE BETTING AUDIENCE IN THE USA

% of the online betting audience in the United States who agree to the following statements.

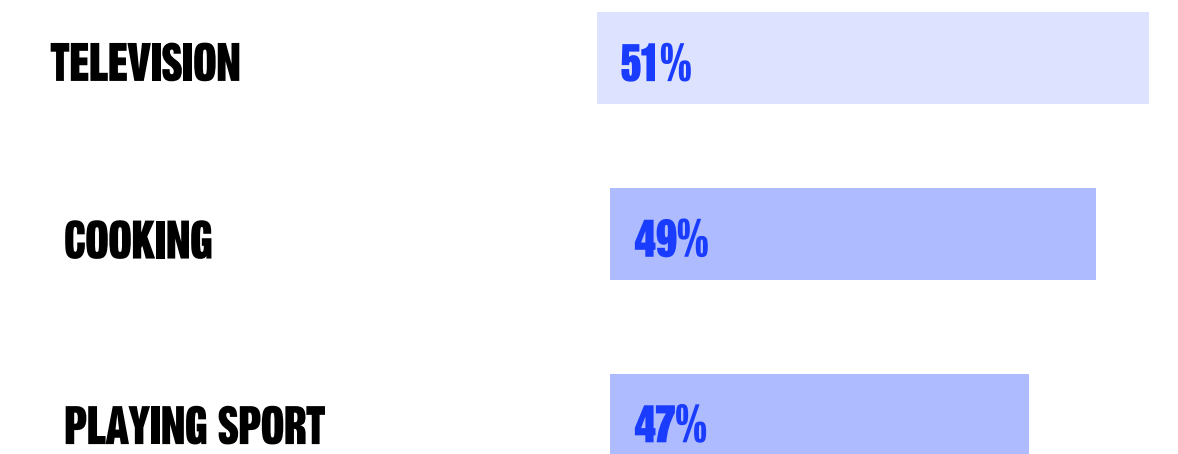
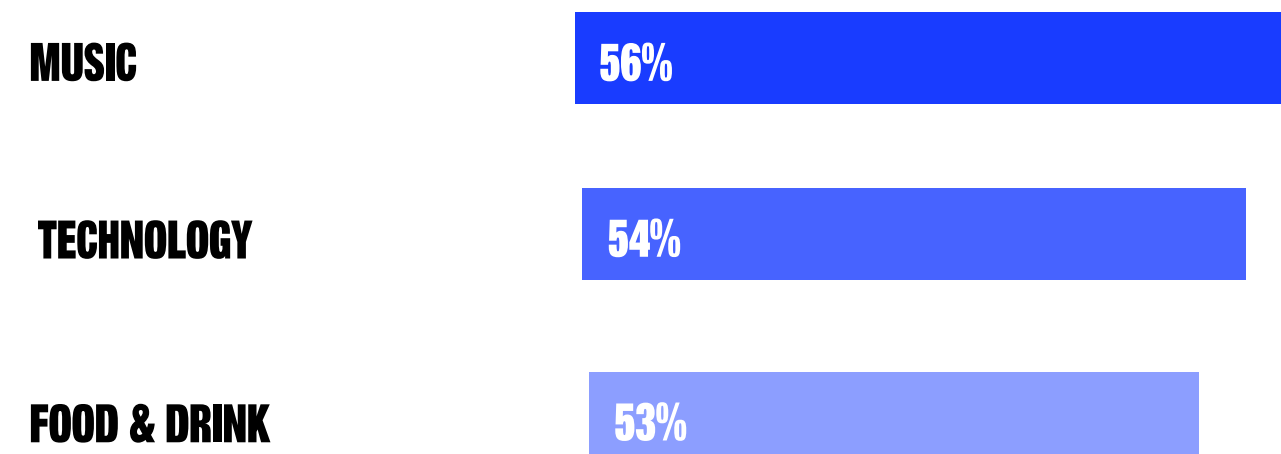


THE ONLINE BETTING AUDIENCE IN THE UNITED STATES ARE ADVENTUROUS & WILLING TO TAKE RISKS*

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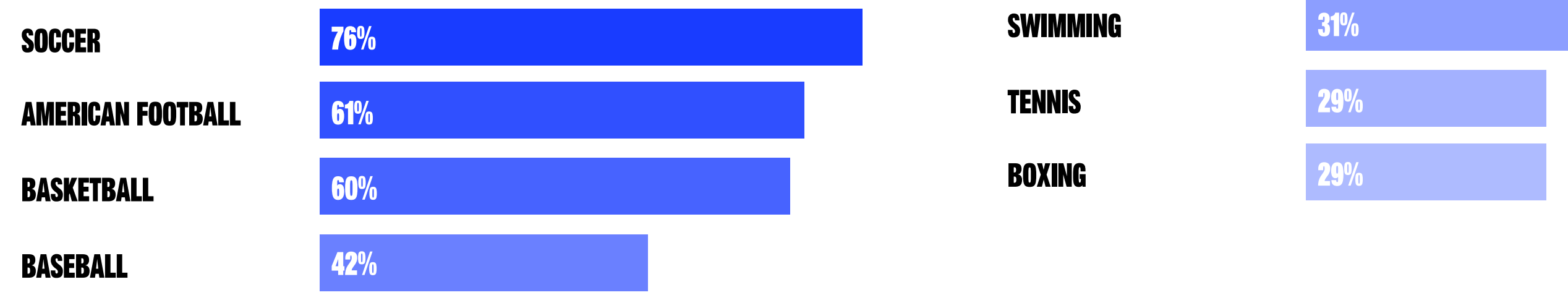
GENERAL INTERESTS OF OUR TARGET AUDIENCE



SOURCE: GWI Q4 2020,

SOCCER AND FOOTBALL ARE THE MOST FOLLOWED AND THE MOST WATCHED SPORTS ON BROADCAST TELEVISION

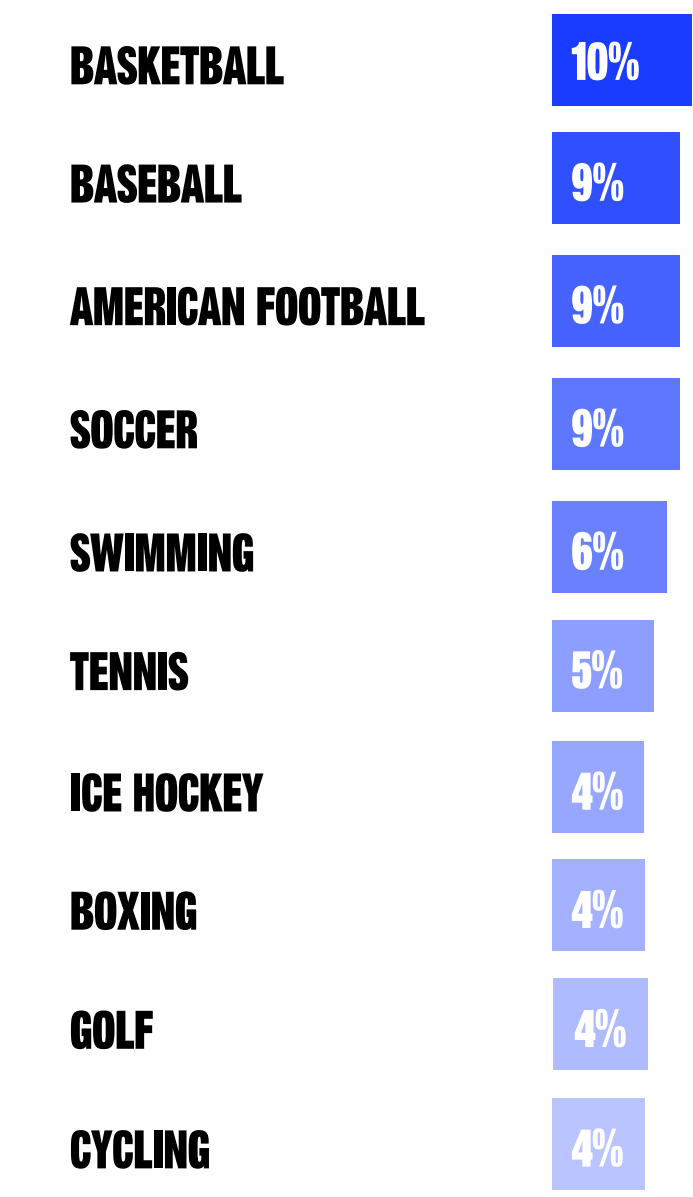
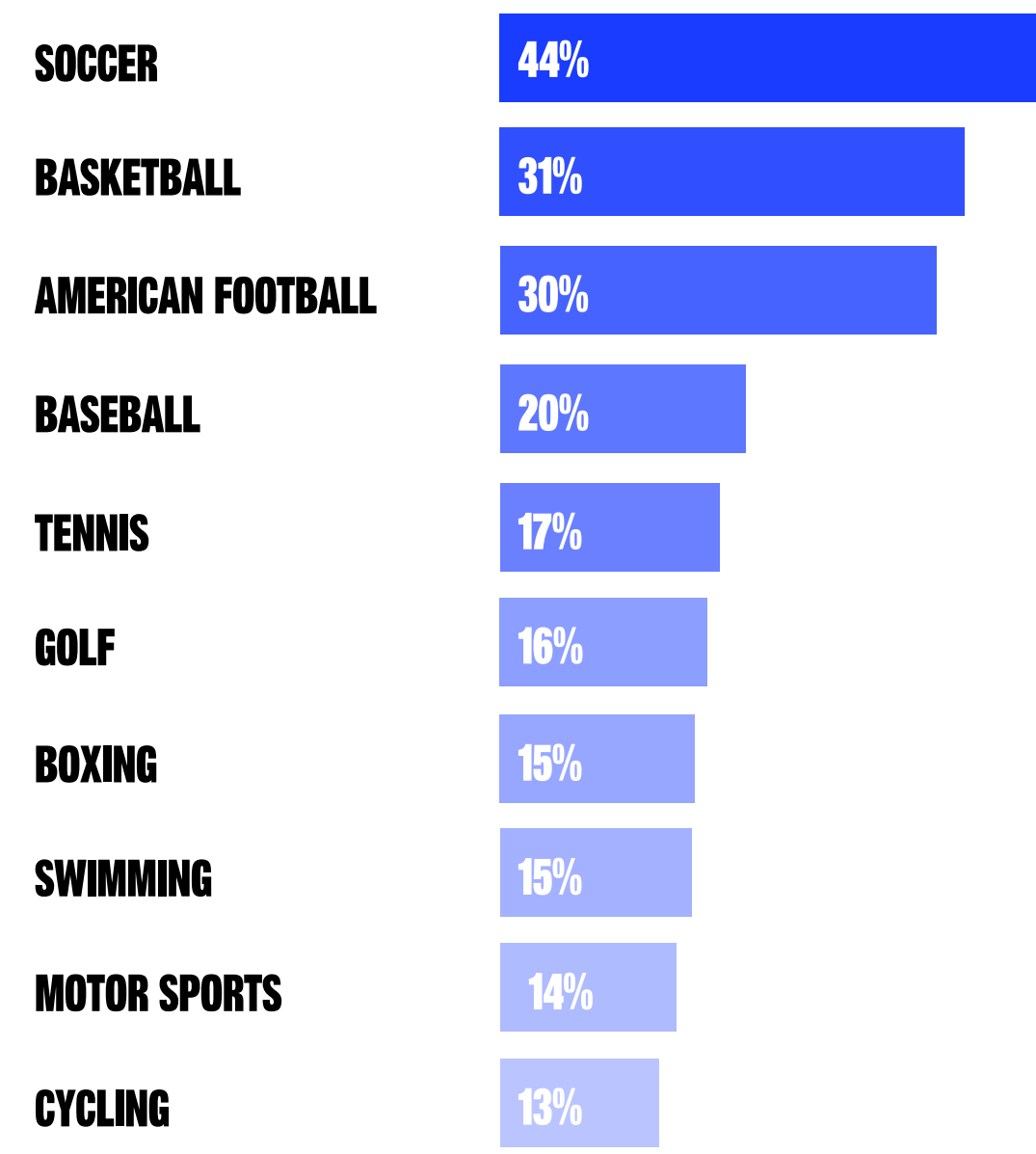
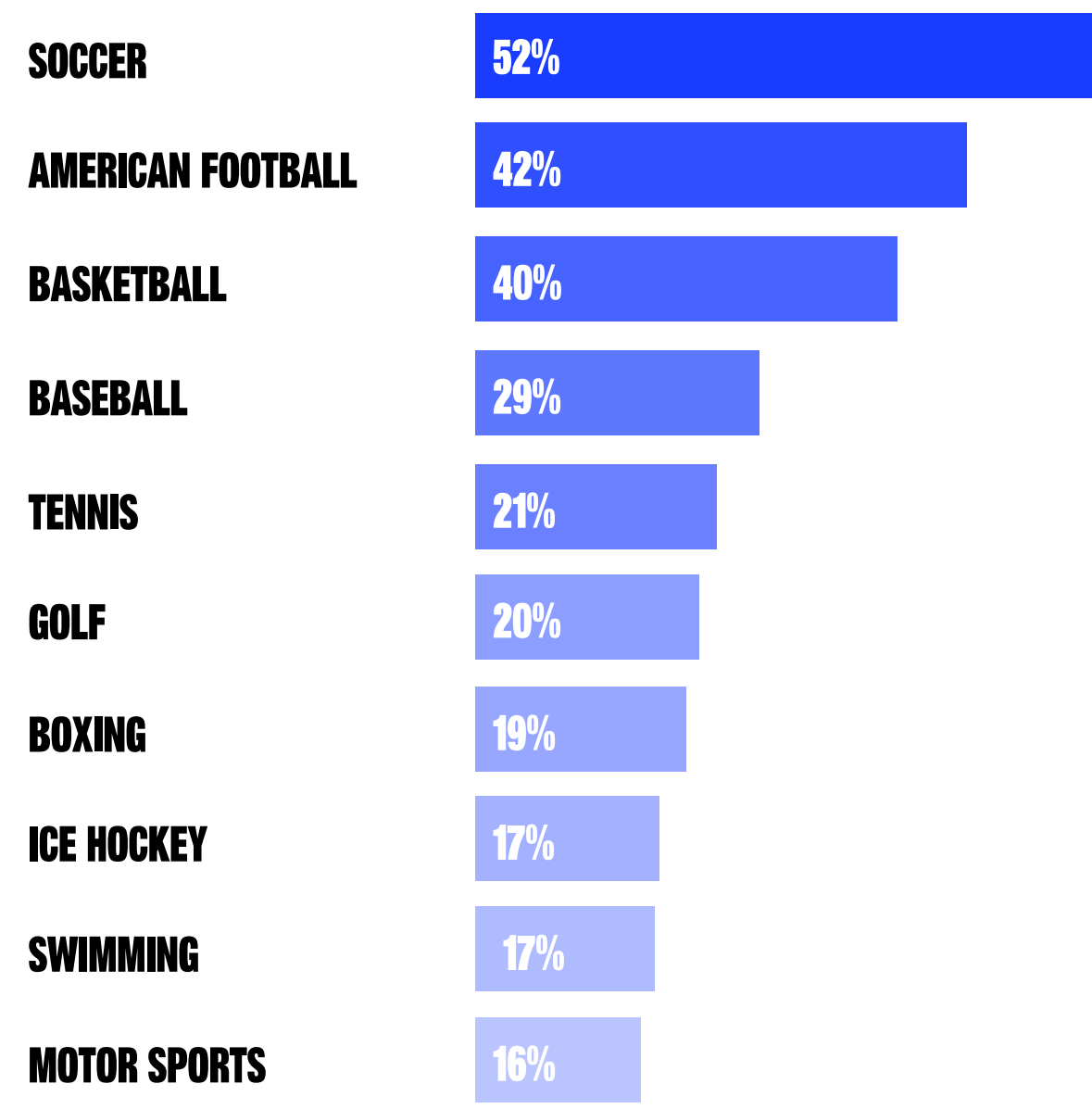
SPORTS REGULARLY FOLLOWED, WATCHED OR INTERESTED IN



SPORTS WATCHED ON BROADCAST TV

SPORTS WATCHED ONLINE

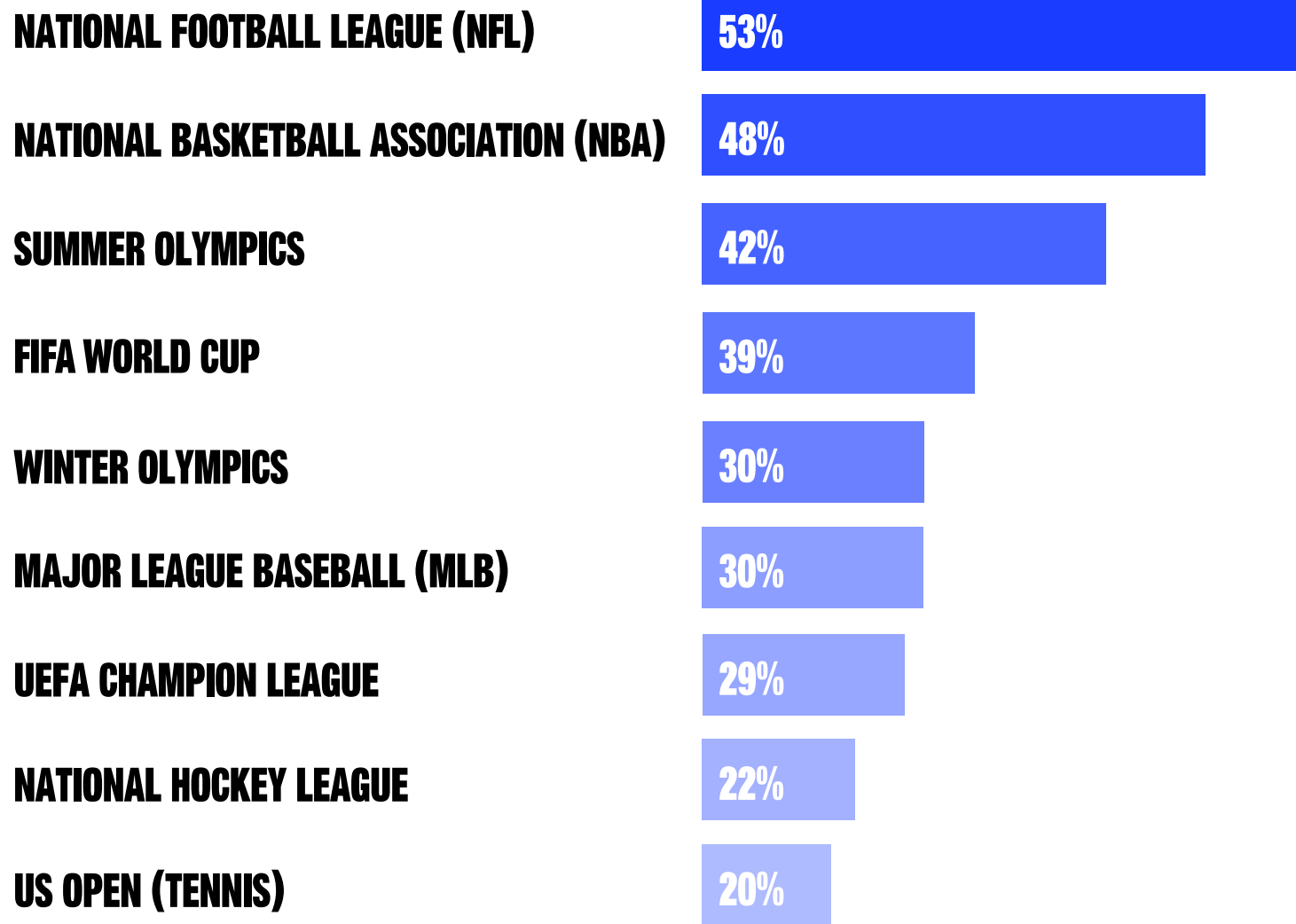
SPORTS WATCHED IN PERSON



THE NFL AND THE NBA ARE MOST POPULAR LEAGUES AMONG AMERICAN BETTORS

29% FOLLOW MORE THAN 11 SPORTS EVENTS/LEAGUES

TOP FOLLOWED/ INTERESTED IN SPORTS EVENTS/LEAGUES



TOP SPORTS EVENTS/LEAGUES WATCHED ON BROADCAST TV



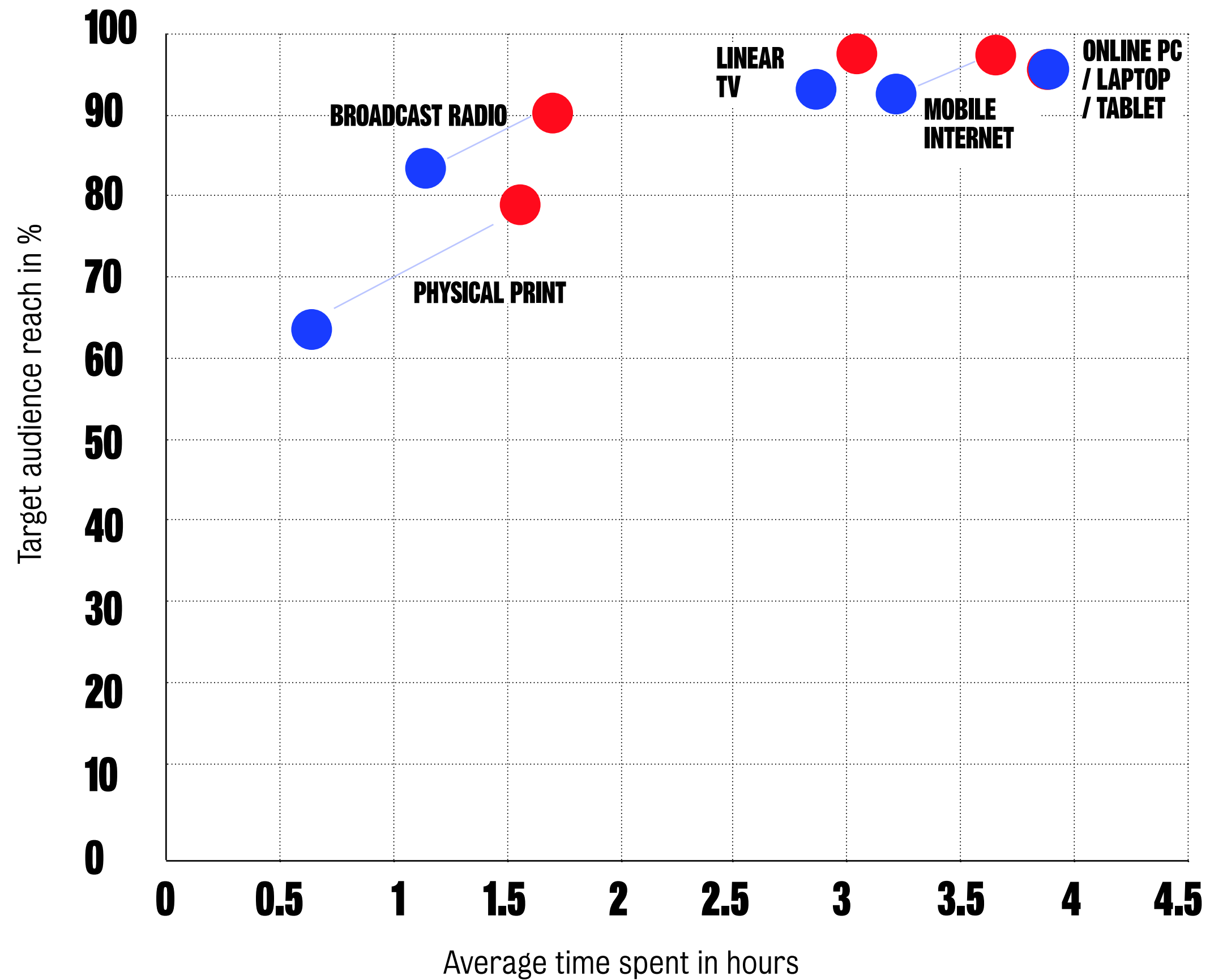
TOP SPORTS EVENTS/LEAGUES WATCHED ONLINE



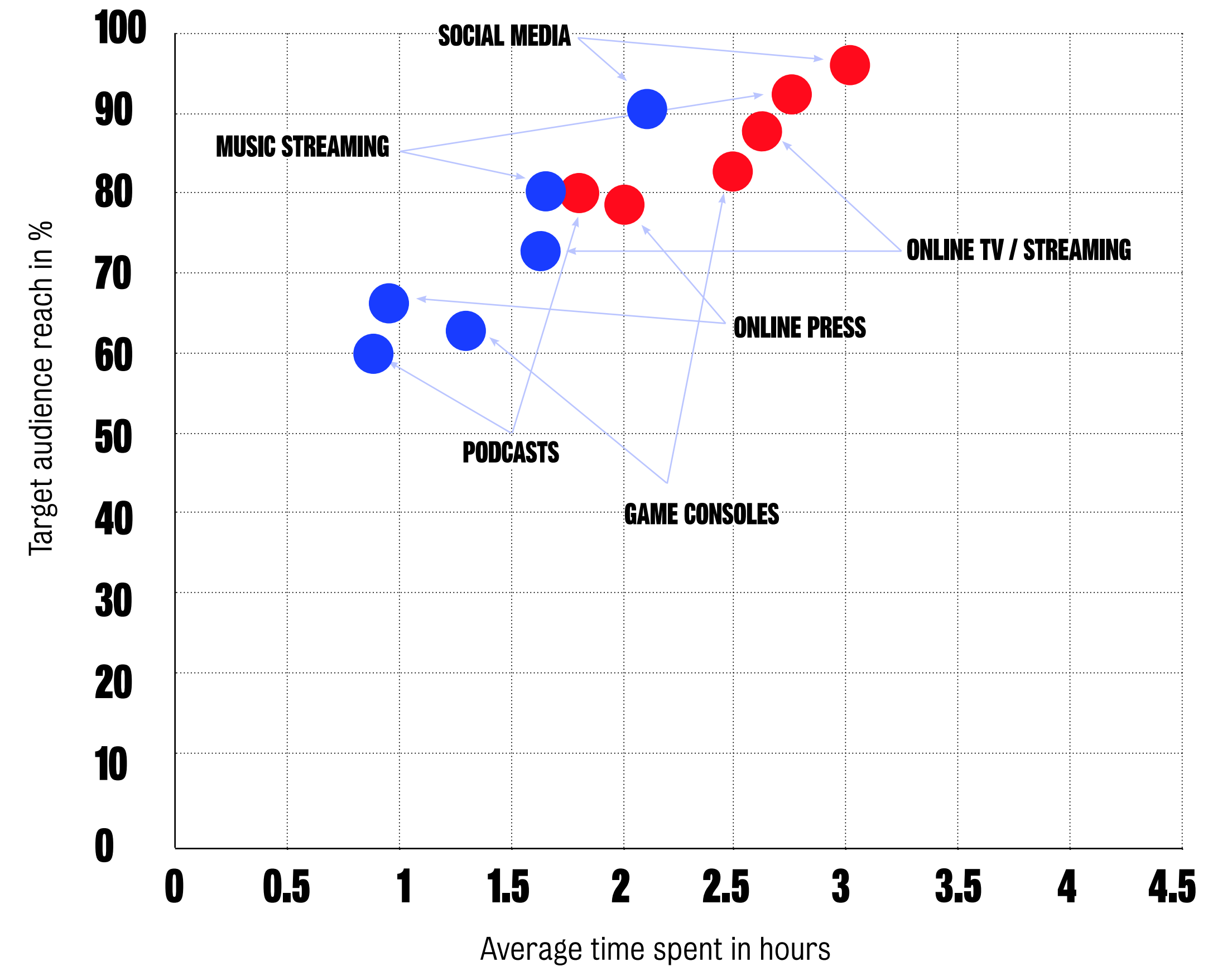
THE BETTING AUDIENCE SPEND MORE TIME ON SOCIAL PLATFORMS THAN THE AVERAGE AMERICAN

- Audience who visited an online casino, betting or lottery service
- All internet users in the United States

REACH VS TIME SPENT IN MEDIA CHANNELS



REACH VS TIME SPENT IN ONLINE PLATFORMS

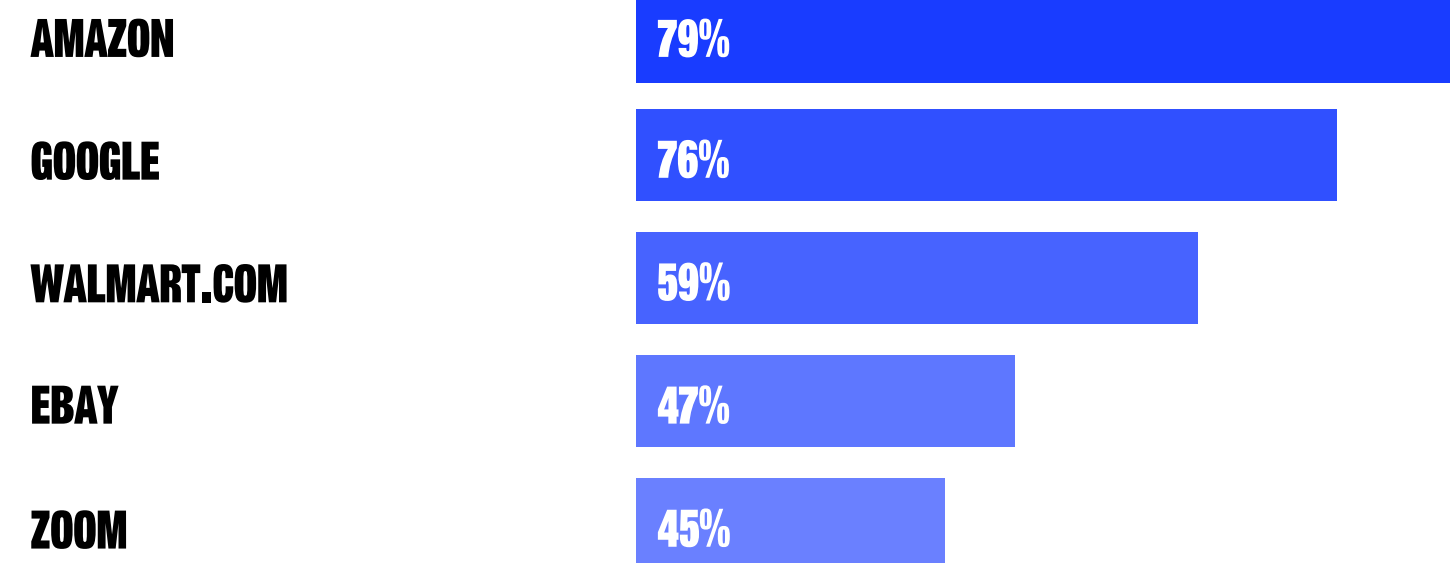


SOURCE: GWI, Q4 2020
 % shows the reach; how many people in your Audience have agreed to a statement or used a particular platform in the past month

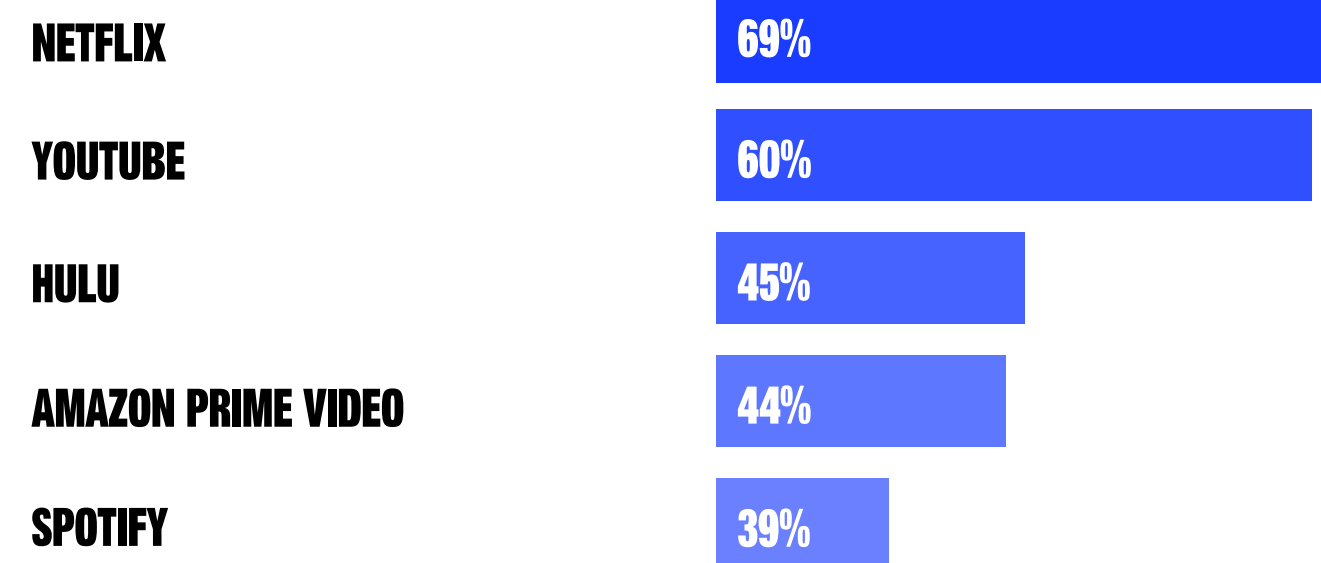
SOCIAL MEDIA AND ONLINE SHOPPING PLATFORMS PROVIDE HIGH REACH AMONG THE ONLINE BETTING AUDIENCE



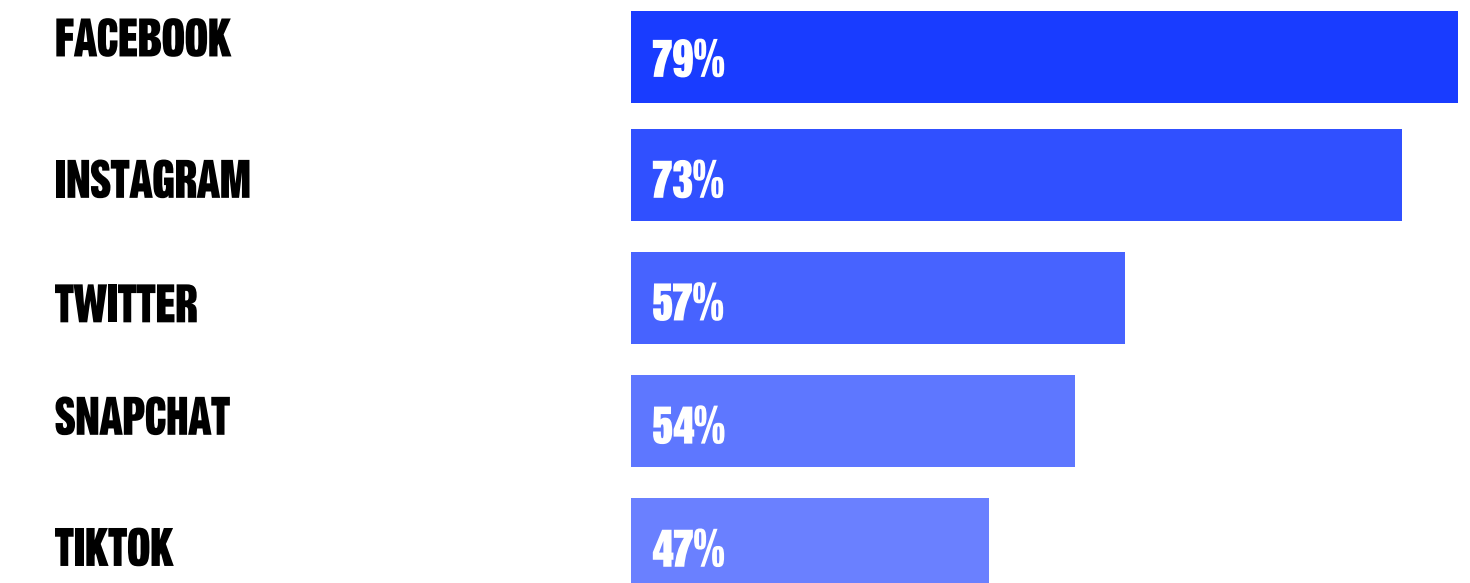
TOP WEBSITES AND APPS



TOP ENTERTAINMENT PLATFORMS TOP



TOP SOCIAL MEDIA PLATFORMS



MEDIA PLANNING INSIGHTS

HOW TO DRIVE EFFICIENCY AND MAXIMIZE YOUR SCALE

It is both important and strategic to surround yourself within a cultural moment, and nowhere is this more important than within the world of sports betting.



THE LARGEST SPORTING EVENTS ONLY HAPPEN ONCE A YEAR, WHICH REQUIRES AN ESCAPE FROM OLD PRACTICES AND CONVENTIONS.

Consistent testing is key to success within the sports betting space to ensure that inventory is varied and achieve scale.



DURING HIGH INTEREST TIME PERIODS WITHIN THE MARKET, WE SEE INCREASES IN ORGANIC TRAFFIC AND COMPETITION.

Increased monitoring with a variety of tools secures efficiency and allows media to optimize towards top performing partners, capitalizing on the fervor of the sporting events successfully.



MEDIA DELIVERY CAN BE AS IMPORTANT AS ACHIEVING SCALE OR DRIVING CONVERSIONS.

Strategically flighting media around specific games, high intent weekends, and assuring creative is weighted accordingly helps to manage our spend and allows us to drive the most efficient conversions.

DISCLAIMER

Gambling can become an addiction. Users of gambling sites must understand there is no guarantee of winning, the loss of money is always a possibility and you are responsible for any losses. We are not responsible for the loss of money while gambling. Those with a gambling addiction should not ignore their problem. If you or someone you know has a gambling addiction or is having problems managing their gambling, contact an American addiction center that includes treatment for gambling problems. [The National Council for Problem Gambling \(NCPG\)](#) offers support and counselling referrals that may help you through personal, gaming-related issues. The [NCPG](#) operates a 24-hour confidential toll-free helpline that you can reach by phone or text at [1-800-522-4700](tel:1-800-522-4700) or chat at ncpgambling.org/chat.

Iowa residents with additional concerns about managing gambling can contact the Iowa Gambling Treatment Program at [1-800-BETS-OFF](tel:1-800-BETS-OFF).

In the United States gambling is illegal in many US states and restrictions such as age are in place. Illegal gambling is a misdemeanor that carries penalties in the USA.

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No one can accuse us of standing still - our industry is advertising and we are operating in an environment of constant turmoil. Our global teams - made up of planning, buying, search & social, app store optimization, and programmatic experts - combine their skill sets to ensure the most efficient use of client budget by preventing an overlap of deliverables across channels.

By leveraging all assets within our control, we improve efficiencies and deliver growth across the digital spectrum, from the initial creative touchpoint through to the optimization of customer journeys with the clients' product.

DISPLAY
PAID SOCIAL
PROGRAMMATIC
REMARKETING
PAID SEARCH
ASO
AFFILIATES
CREATIVE

TALK TO US!

PEOPLE WITH PERSONALITY AND PASSION



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