

# Sports Betting in the U.S.A.

Understanding gambling attitudes  
and behaviors a year on from SCOTUS  
lifting the sports wagering ban

GLOBALWEBINDEX REPORT 2019

[www.globalwebindex.com](http://www.globalwebindex.com)





**Jason Mander**  
Chief Research Officer

The repeal of PASPA has opened up huge new opportunities for brands, but so too has it brought a range of new possibilities for sports fans. GlobalWebIndex's mission has always been to uncover the attitudes and sentiments which drive consumer behavior, and hence partnering with The Action Network to understand the current landscape from the perspective of sports fans was a natural fit.

The results are striking. Not only do sports fans accept and approve of the legalization, they are clearly very excited about it and willing to embrace sports betting wholeheartedly. That extends far beyond the biggest leagues or biggest matches of the year, touching everything from new and burgeoning areas like eSports through to engaging with individual players or match components. Across all this runs a real thirst for improved knowledge about sports betting and a desire for convenient, real-time forms of engagement. As sports betting pushes further into the mainstream, we are excited to track how consumer sentiment continues to unfold.



**Patrick Keane**  
CEO of The Action Network

When the United States Supreme Court repealed PASPA, it sparked an all-out arms race among sports book operators, rights holders, teams and leagues to quickly learn how to engage with consumers interested in legally sports betting in the U.S. for the first time. Sports betting has become the new center of gravity for the sport industry, dictating conversations from league boardrooms to senate hearings. At the time this was written, ten states have legalized sports betting, with additional states having introduced legislation in favor of implementation. And with the legal and regulatory landscape evolving each week, The Action Network is becoming the leading reference brand in this space for covering news in the category.

To commemorate the one year anniversary of this landmark decision, The Action Network partnered with GlobalWebIndex to understand the ways in which consumer sentiment and perception toward sports betting have changed since PASPA's repeal. We're encouraged by the findings. As the sports betting industry matures in the United States, we look forward to playing a critical role in shaping its future by first understanding and then super-serving sports fans.

## Contents

Key Insights	05
Surveying the Scene: 12 Months Since PASPA Repeal	06
How Betting Integrates with Sports	09
The Role of Data and Analytics	12
Notes on Methodology	16
More from GlobalWebIndex	17

### Definition of a Sports Fan

During this report, we will draw on an audience of “sports fans”, who are defined as those who selected 8, 9 or 10 on a 0-10 scale indicating how much of a sports fan they are.

## Introduction

In 1992, President George Bush signed the Professional and Amateur Sports Protection Act (PASPA), also known as the Bradley Act. With a handful of exceptions, the legislation effectively outlawed sports betting across the United States.

Following years of legal challenges, it was ruled unconstitutional by the Supreme Court and repealed in May 2018. In this report we provide the facts, figures and insights to help uncover the effect of the repeal on sports fans in the U.S.

## Key insights



### **Consumers need guidance in the new betting landscape.**

With varying legislation state-by-state, consumers can be unclear on the legality on betting in their own state. For those interested in betting, demand for educational resources and information is strong.

### **Sports betting bolsters sports as a whole.**

Sports fans see betting as an extension to their viewing habits and their interest in their favorite events. Most sports fans see it as an addition, not a detraction, to the experience of following sports.

### **A mobile-friendly approach chimes with sports fans.**

In the fractured legal landscape, consumers crave convenience in their betting options. They're interested in apps, as well as real-world locations, as places to make their bets.

### **Consumers are interested in betting add-ons and tools.**

With more sports fans likely to place bets than 12 months ago, they're looking for expert tools to improve their betting performance, and in many cases say they are happy to pay for access.



# Surveying the Scene: 12 Months Since PASPA Repeal

# Awareness and Interest in Sports Betting

On May 14 2018, the United States Supreme Court overturned the Professional and Amateur Sports Protection Act (PASPA), in effect freeing up individual states to create their own legislation on sports betting.

While the new legislation has been widely heralded as a milestone, it has created further questions. What visions of legalized betting will different states take? How do consumers feel about the change in law? How likely are they to bet, and in what ways? Through a bespoke survey we carried out

among internet users in the U.S. in April 2019, GlobalWebIndex can shed light on how the sports betting landscape looks one year on.

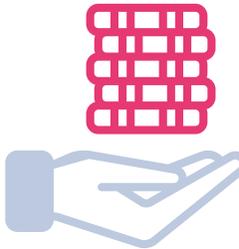
Pushing through legislation to further roll out sports betting has met opposition in some states but, in general, **internet users in the U.S. are supportive of the legislation.** Three-quarters support the repeal of the bill. But with states generating their own laws, there is some confusion among consumers about the exact legal status of sports betting. 33% of those who live where sports betting

isn't legal think that it is, while 11% of those who live in states where it is legal think it isn't. Many more are uncertain about the status of betting.

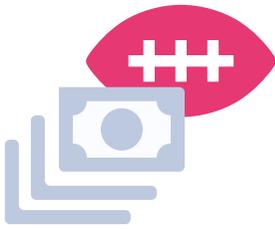
Nevertheless, a year since PASPA was repealed, change is taking place. **44% say they have already placed a bet**, or would consider making one if it became legal in their state. If we hone in on the most enthusiastic sports fans, 46% say they are more likely to place a bet than they were a year ago.



9 in 10 sports fans **support legalization of sports betting**



9 in 10 are **interested in placing a bet** on at least one sport/tournament



46% of sports fans are more likely to **place a sports bet than they were a year ago**

**Question:** How do you feel about the legalization of sports betting? // Have you placed a bet since it was legalized/ if it was legal in your state, would you consider placing a sports bet? // Compared to 12 months ago, would you say you are more or less likely to place a sports bet?  
**Source:** GlobalWebIndex April 2019 **Base:** 2,879 U.S. internet users aged 21-64 / U.S. 1,055 sports fans aged 21-64

As more states draft betting legislation, the role that gambling has in consumers' lives is under the spotlight. But what's striking is that **sports fans see it first and foremost as a boon to the economy**, or to industries as a whole. 55% think it would be good for the economy, and 47% think it would make people more interested in sports events. Personal factors aren't too far away though, as 4 in 10 see the chance to make personal profit as a benefit to the legislation.

On top of that, our survey indicates sports betting can bolster the sports industry by driving interest in the competitions at the heart of it. **62% sports fans would be more likely to watch a game on TV if they had a bet on the outcome**, while 46% would be more likely to watch a game in person. The benefits of PASPA repeal extend beyond just gambling operators. The results are promising for media stakeholders too.

### Perceived Benefits of Legalized Sports Betting

*% of sports fans who say legalized sports betting will have the following benefits*

It could be good for the economy	55%
It will make people more interested in games	47%
It will make sports more exciting	47%
It will make sports more social / fun to watch	45%
It might allow me to make a profit	40%
Allows to better monitor the integrity of games	35%

**52%** of sports fans bet for the fun/excitement of it



THE ACTION  
NETWORK

# Integrating Betting with Sports

---

Report 2019

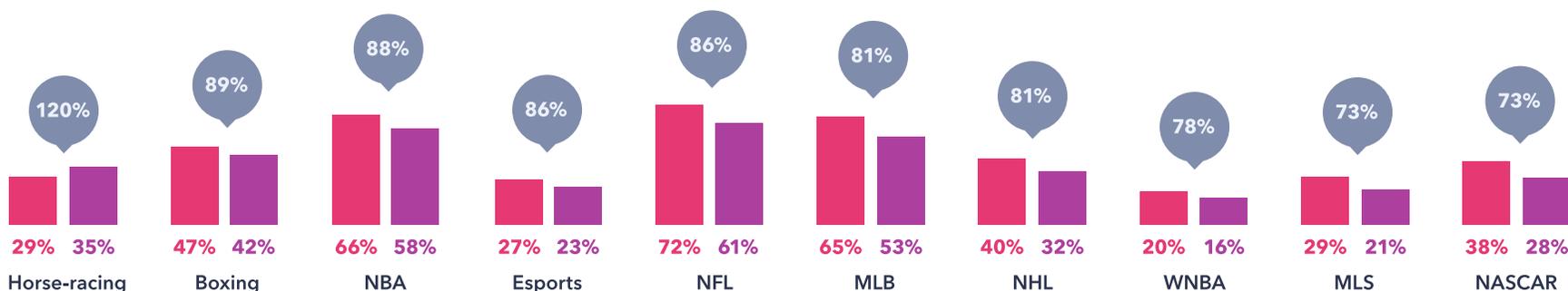
## Betting Interest by Sport

In understanding the U.S. gambling landscape 12 months from the repeal of PASPA, the next step is to explore the context behind betting practices. In particular, how does interest in gambling vary among different sports, relative to their overall interest?

### Betting Interest for Different Sports

% of sports fans who...

● Are interested in the sport ● Would make a bet on the sport ● Ratio



**There's a high level of interest in gambling across almost all major sports and competitions,** including women's sports and esports. 61% of sports fans would be interested in making a bet on the NFL, and 58% would consider making a bet on the NBA. **Gambling is not a fringe interest for the biggest sports in the U.S.** – it's something that many sports fans are actively considering.

In analyzing general interest and gambling interest side-by-side, we can also see which sports have a disproportionate interest in

betting. Horse-racing stands out, with more consumers interested in gambling in it than they are in following it. It's a bit of an exception, as gambling is more central to the sport's lifeblood, and betting on it has been legal in the U.S. for decades. But it suggests something else too, that becomes more apparent looking at the second-most successful sport in drawing users to gamble – boxing. Like horse-racing, boxing is slightly different to the rest, as its long association with Las Vegas and the state of Nevada (which had state law shielding it from

PASPA) has created more of a betting culture around it.

But both horse-racing and boxing are also linked by being geared toward the occasional bet, as sports that naturally revolve around high-profile, singular events. How bettors would engage with a longer season in flagship sports competitions is less well-defined. In the NFL for example, how would a sports fan bet? On a game-by-game basis? Only for the playoffs, or just for the Super Bowl?

**Question:** Which of the following sports are you interested in/might you be interested in placing a bet?  
**Source:** GlobalWebIndex April 2019  
**Base:** 1,055 U.S. sports fans aged 21-64

## What Draws Sports Fans to Betting

Analyzing factors that would encourage someone to bet can help fill in this picture. **39% would bet if there was a big or exciting game**, which fits in with the model of the one-off, occasional bet. The biggest driver for a fan to place a sports bet, however, is if a favorite team is doing well. The logic is obvious – a team doing well is more likely to bring in a return, making someone more likely to bet. But it also hints at the role data and analytics can play (a subject we will cover in more detail later in the report), through using tools that can give bettors a better understanding of how teams are likely to perform. It also suggests an interest in betting throughout a season, and not just for big games.

Perhaps the most revealing finding from this particular question is that 38% of sports fans would be more likely to bet if the process was easier. This figure stays consistent, regardless of the current legal status of betting in a respondent’s state. **Even in states where sports betting has been legalized, there are barriers in the way for consumers to engage in this pastime.**

This points toward a desire for a more convenient betting process. One way this can be achieved is through mobile optimization of sports betting. 79% of sports fans would consider placing a bet on an app or website (whether from a sportsbook, casino, or other provider) compared to 51% who would make a bet in a physical location.

This is a critical point to bear in mind as states begin to introduce their own specific laws. In Mississippi, online sports betting can only take place within the grounds of a casino, and Louisiana’s new law looks likely to come with the same caveat. In Rhode Island, sports betting was initially limited to two casinos, but the law was revised to include online sources a year later, in part because mobile gambling offered greater revenue streams. New Jersey, the state behind the motion to challenge PASPA, **makes** 80% of its sports betting revenue through online sources.

Smartphones also offer up new possibilities for gambling as a second-screen to the action taking place on a TV, or in a stadium. Two-thirds of sports fans would be interested in gambling being integrated into the live viewing experience of sports events. Over three-quarters would be OK with betting being mentioned during a sports broadcast, and the same number would be comfortable with gambling operators having a presence in sporting arenas.

Not only are sports fans happy to have gambling mentioned in sports coverage, and see it in real-world environments, they’re also keen to bet in-play. **86% would make a bet while watching a game, if they had the chance to.** A mobile device doesn’t just reduce the need to physically travel to place a bet; it also facilitates interaction as a second-screen device, something that sports fans are inclined to add to their viewing experience.

### What Drives Sports Betting

*% of sports fans who would be more likely to bet on sports based on the following reasons*

<b>If a favorite team is doing well</b>	<b>43%</b>
<b>If there is a particularly big and exciting game</b>	<b>39%</b>
<b>If it were easier to place a bet</b>	<b>38%</b>
<b>If a favorite player is doing well</b>	<b>33%</b>
<b>If friends/family/coworkers are also placing bets</b>	<b>33%</b>
<b>If there was better knowledge of how betting works</b>	<b>30%</b>
<b>If there was a better understanding of the analytics side of sports</b>	<b>27%</b>
<b>If there were in-depth articles/videos explaining betting trends</b>	<b>26%</b>

**Question:** Which of these reasons might make you more likely to bet on sports?  
**Source:** GlobalWebIndex April 2019  
**Base:** 1,055 U.S. sports fans aged 21-64



THE ACTION  
NETWORK

# The Role of Data and Analytics

# Betting Influences

The other aspect of a mobile-friendly landscape for sports betting is in its ability to pave the way for app-based tools, like data and analytics providers. Frequently in our research into digital trends, we come across the phenomenon of the “late mover advantage”, whereby a late entrance into an industry from a country or company allows them to reshape the market. The U.S. is uniquely able to take advantage of this with sports betting, as it’s becoming

legalized at a time when consumers use their smartphones more than ever. In fact, GlobalWebIndex’s latest wave of ongoing global research reveals that consumers in the U.S. now see smartphones as more important than their desktop computers and laptops for the first time. We’ve already established consumer momentum towards placing bets on digital channels; now we will examine the appetite for betting tools and services.

## How Betting is Researched

*% of sports fans who have researched betting in the following ways*



**Online**  
48%



**Family/friends**  
38%



**Apps**  
36%

First, it's worth understanding the context that these tools operate in, and how online resources play a part in informing betting practices. The interesting thing here is that while online channels are most important for researching betting as a whole, offline sources are more prominent when influencing specific betting decisions. **Friends and family are the most trusted influencers in guiding sports fans to make their bets.**

### Betting Influencers

*% of sports fans who say the following would influence their betting decisions*

<b>Friends/family</b>	<b>45%</b>	<b>TV shows</b>	<b>37%</b>
<b>Professional bettors/gamblers</b>	<b>39%</b>	<b>Betting websites/apps</b>	<b>34%</b>
<b>Sports analysts/writers</b>	<b>39%</b>	<b>Oddsmakers</b>	<b>27%</b>
<b>Sport websites/apps</b>	<b>39%</b>	<b>Coworkers</b>	<b>24%</b>
<b>Social media</b>	<b>37%</b>		

Following friends and family is a series of options that could be categorised as “expert” influencers, with 39% of sports fans saying that professional gamblers and sports analysts would influence their betting behavior. Betting websites/apps are further down the list at 34%, but they are roughly in line with more popular channels like social media and TV shows. For betting apps and websites to further infiltrate popular sports culture, and build on offline sources of influence, it may be fruitful to seek partnerships with the types of expert personalities who are guiding fans.

**83%** of sports fans think it would be essential/important to use data/research in their betting decisions

**Question:** Which of these people/sources do you think would be most likely to influence your sports betting decisions? **Source:** GlobalWebIndex April 2019 **Base:** 1,055 U.S. sports fans aged 21-64

# Appetite for Betting Tools

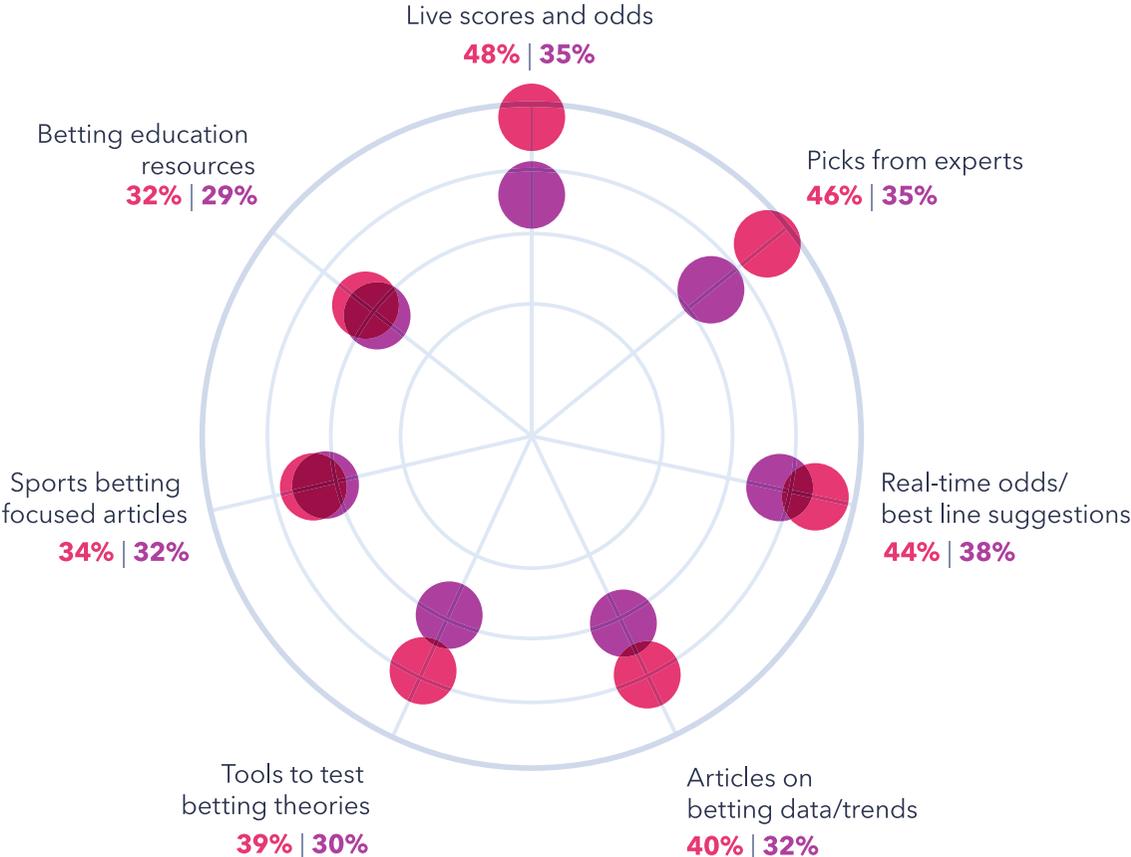
The most popular betting tools are live odds tracking and expert picks, with almost half of sports fans interested in using these resources. Along with a strong performance for best line suggestions, there's another sense here of how much expertise is desired as a guide to decision making for sports fans in their betting. It's encouraging for a burgeoning industry that many would be willing to pay for those services.

The services more likely to convert a sports fan into a paid user of a betting platform are educational content, and tools to test betting theories to original articles focused on the sports betting market. The willingness consumers have to pay for educational content (though it may not translate to actual payment) underlines many of the findings we explored at the beginning of this report - that more consumer information is necessary to increase adoption. 12 months from the repeal of PASPA, appetite for betting, and for using services to help with betting, is high. But the road to expanding this industry requires additional efforts. From making consumers aware of where and how sports betting can be practised, to guiding sports fans with tools that optimize betting strategy, the next year should see more developments to deepen knowledge of the new industry.

## Interest in Betting Resources

% of sports fans who would...

● Read/consume ● Pay for

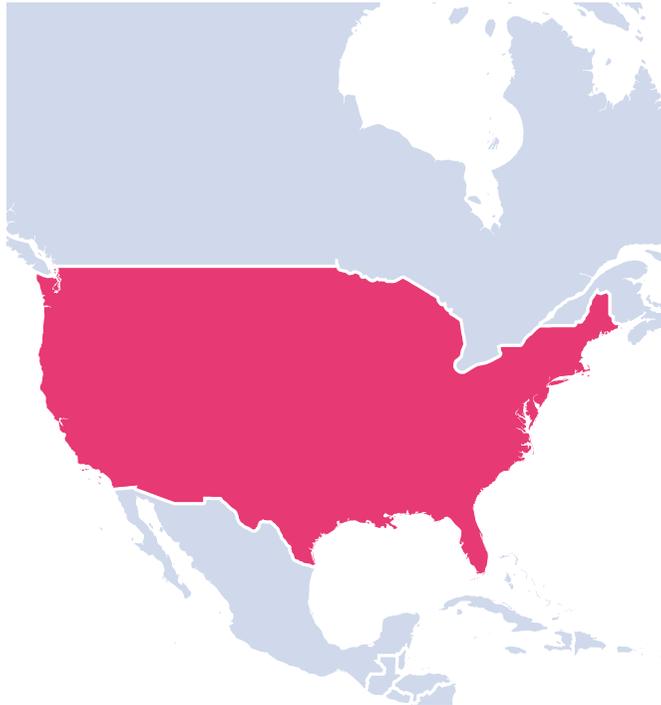


Question: Which of the following would you be interested in reading/consuming/paying to access? Source: GlobalWebIndex April 2019 Base: 1,055 U.S. sports fans aged 21-64

## Notes on Methodology

Unless otherwise stated, the data in this report is taken from a bespoke survey from April 2019 among 3,057 internet users in the U.S., including a sample of 1,055 sports fans aged 21-64. Please note, where clearly stated, this report also draws insights from GlobalWebIndex's ongoing global Core research.

For an in-depth explanation of GlobalWebIndex's research and methodology, including information on our country coverage, internet penetration rates, our sample structures, and much more, please [click here](#).



### Our Research

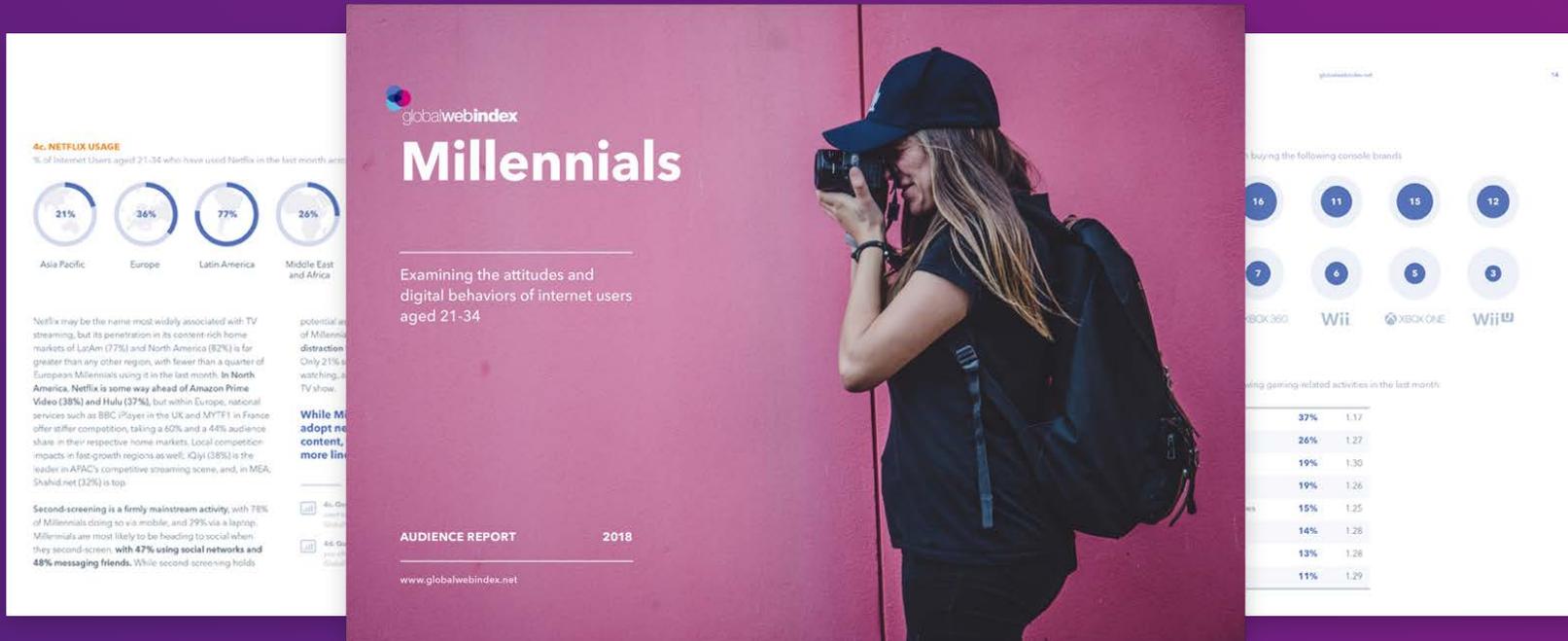
As part of our ongoing global research, each year GlobalWebIndex interviews over 550,000 internet users aged 16-64 across 45 markets. Respondents complete an online questionnaire that asks them a wide range of questions about their lives, lifestyles and digital behaviors. We source these respondents in partnership with a number of industry-leading panel providers. Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and no respondent can participate in our survey more than once a year (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

### Our Quotas

To ensure that our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education - meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

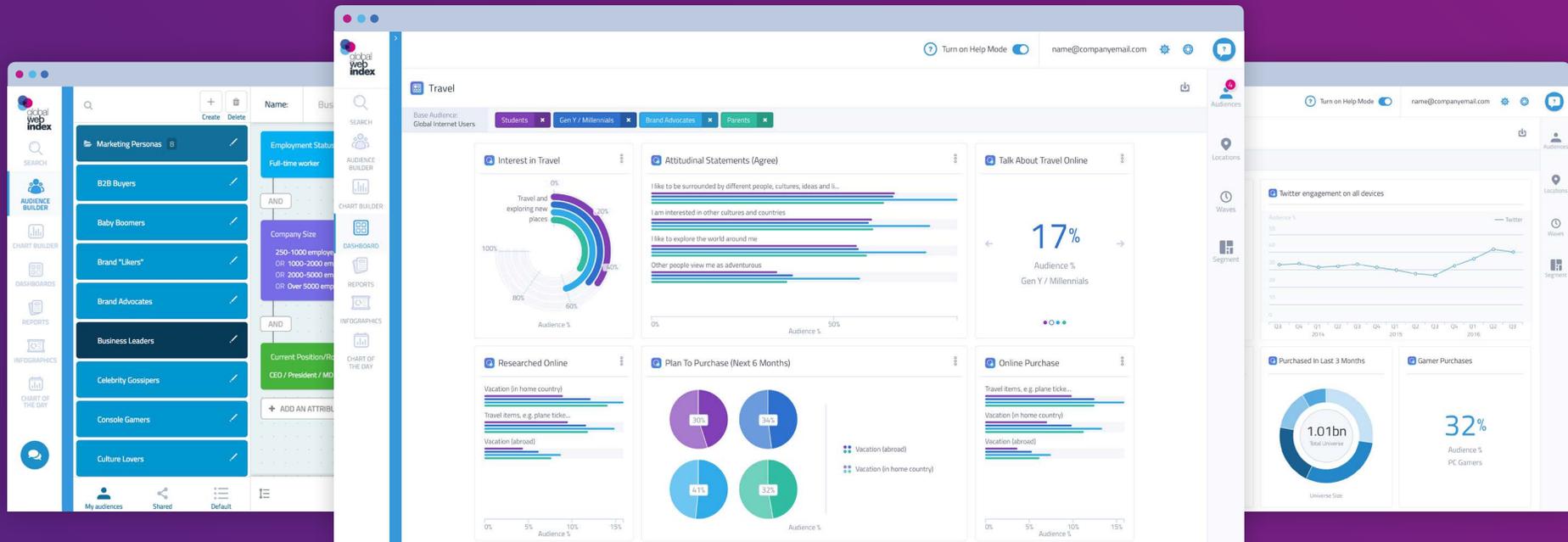
This research is also used to calculate the "weight" of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.



## Like what you've read?

There's plenty more where that came from. Browse our latest reports and infographics examining key consumer trends across markets.

[Access More Reports](#)



## Get more from your data.

Run your own custom studies using our panel of 22 million consumers, and get instant access to insight tailored to your business needs.

[Request Custom Research](#)



**Chase Buckle**

Trends Manager

[chase@globalwebindex.com](mailto:chase@globalwebindex.com)



**Jason Mander**

Chief Research Officer

[jason@globalwebindex.com](mailto:jason@globalwebindex.com)



**Chris Beer**

Senior Trends Analyst

[chris@globalwebindex.com](mailto:chris@globalwebindex.com)

[www.globalwebindex.com](http://www.globalwebindex.com)

Copyright © Trendstream Limited 2019 - All rights, including copyright, in the content of GlobalWebIndex (GWI) webpages and publications (including, but not limited to, GWI reports and blog posts) are owned and controlled by Trendstream Limited. In accessing such content, you agree that you may only use the content for your own personal non-commercial use and that you will not use the content for any other purpose whatsoever without an appropriate licence from, or the prior written permission of, Trendstream Limited. | Trendstream Limited uses its reasonable endeavours to ensure the accuracy of all data in GWI webpages and publications at the time of publication. However, in accessing the content of GWI webpages and publications, you agree that you are responsible for your use of such data and Trendstream Limited shall have no liability to you for any loss, damage, cost or expense whether direct, indirect consequential or otherwise, incurred by, or arising by reason of, your use of the data and whether caused by reason of any error, omission or misrepresentation in the data or otherwise.



THE ACTION  
NETWORK



**Darren Rovell**

Senior Executive Producer

darren@actionnetwork.com



**Patrick Keane**

Chief Executive Officer

pk@actionnetwork.com



**Matt Restivo**

Chief Product Officer

restivo@actionnetwork.com



**Chad Millman**

Chief Content Officer

chad.millman@actionnetwork.com

With contributions from  
**Brandon Cohen**

[www.actionnetwork.com](http://www.actionnetwork.com)

Copyright © Trendstream Limited 2019 - All rights, including copyright, in the content of GlobalWebIndex (GWI) webpages and publications (including, but not limited to, GWI reports and blog posts) are owned and controlled by Trendstream Limited. In accessing such content, you agree that you may only use the content for your own personal non-commercial use and that you will not use the content for any other purpose whatsoever without an appropriate licence from, or the prior written permission of, Trendstream Limited. | Trendstream Limited uses its reasonable endeavours to ensure the accuracy of all data in GWI webpages and publications at the time of publication. However, in accessing the content of GWI webpages and publications, you agree that you are responsible for your use of such data and Trendstream Limited shall have no liability to you for any loss, damage, cost or expense whether direct, indirect consequential or otherwise, incurred by, or arising by reason of, your use of the data and whether caused by reason of any error, omission or misrepresentation in the data or otherwise.