

United States



# Bettor research

Behind the lines with sports bettors

---

Living consumer intelligence | [yougov.com/business](https://yougov.com/business)



# The sports betting market has experienced disruptions following ESPN BET's entrance to the market



This report seeks to answer three questions



Which sportsbooks are trending right now, and with which age groups?



Which in-app features matter most to current and prospective bettors?



What's the next frontier in sports betting innovation?



# Methodology

YouGov surveyed 2,000+ US sports bettors from January 5-18, 2024.

The respondent pool contains Americans who have bet on sports in the previous 12 months and Americans who have not bet on sports in the previous 12 months, but who might in the next 12 months.

71% of the respondents in our survey are current sports bettors, and 29% are prospective sports bettors.

All results have been weighted by age, gender, race, political affiliation, education level, and region.

[Explore more data >](#)

[Get in touch >](#)



# Sportsbook demographics

65% of sportsbook users in the last 12 months are 25-44.

54% of prospective bettors are 25-44.

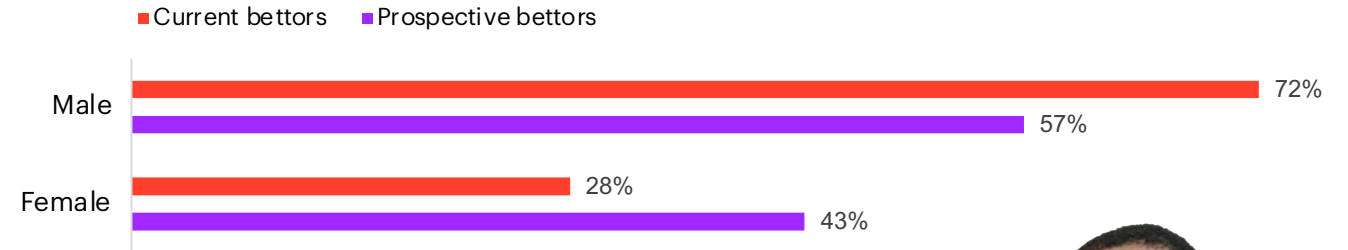
## Concentration of male, 25-44 year-olds

- Majority of current and prospective sports bettors are male
- More penetration possible among 21-24 and 45+ sports bettors

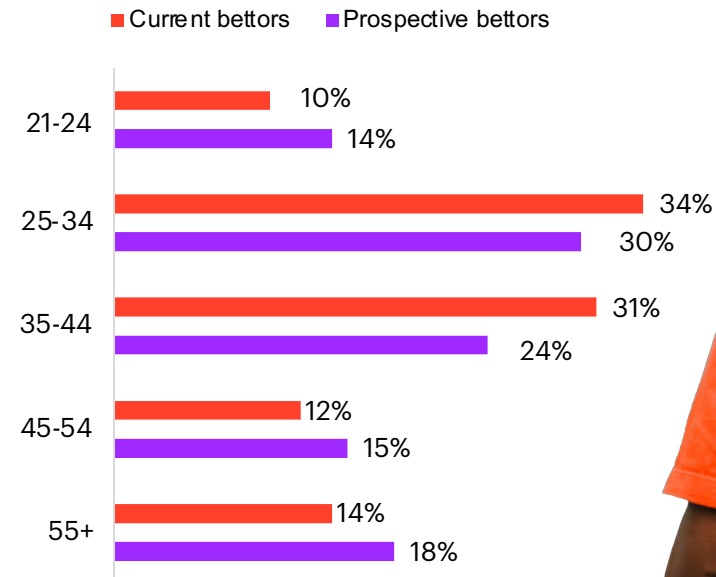
Current bettors: Used a sportsbook in last 12 months (N=2262)

Prospective bettors: Non-users, non-rejectors (N=660)

## Sports bettors - gender



## Sports bettors - age



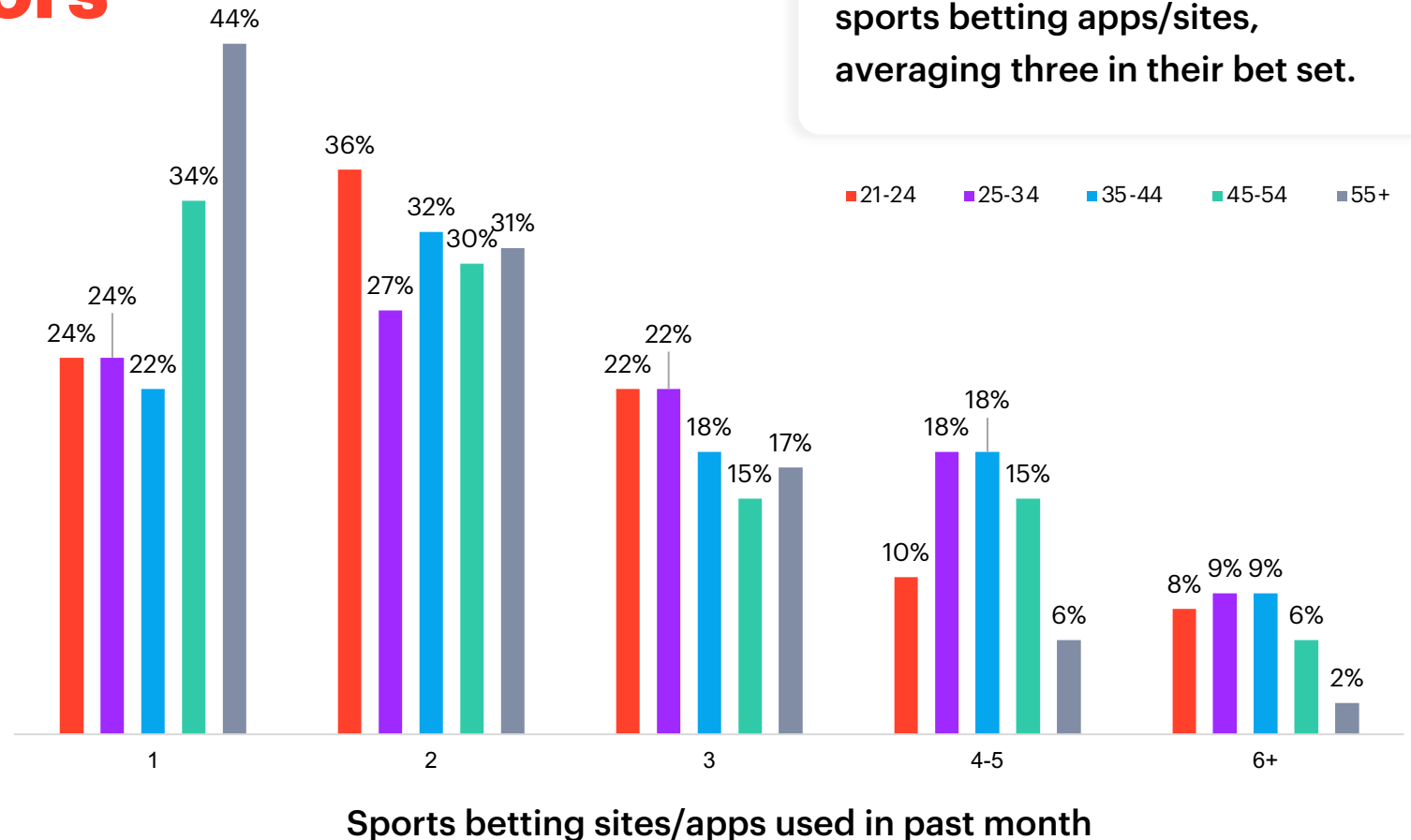




# Which books are trending?

# Older bettors are more loyal, younger bettors branch out

73% of sports bettors used more than one app last month. Less than half (43%) used 3+.



How many sports betting apps/sites have you used in the past month? Please select all that apply. (January 5-18, 2024, N=1602)

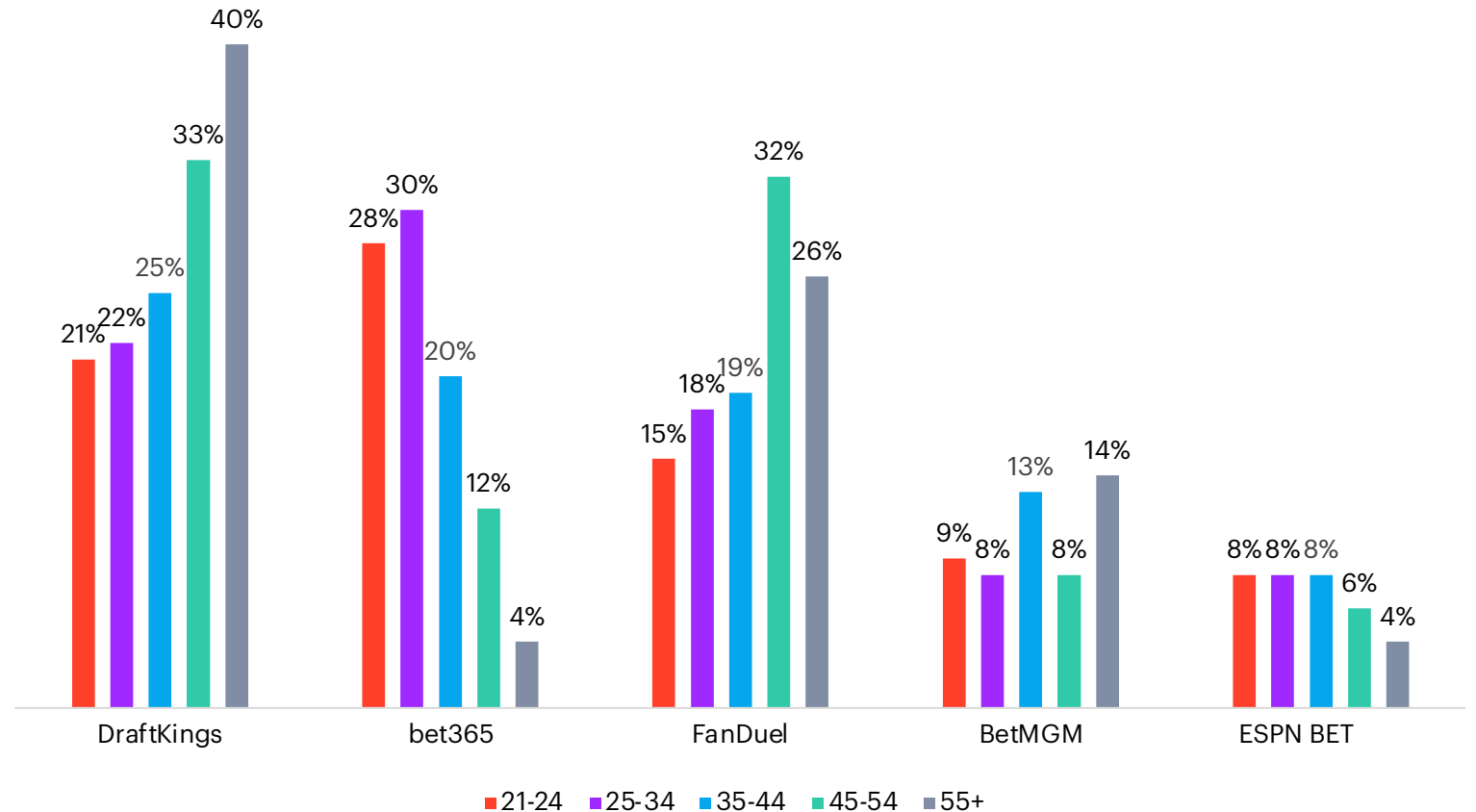


# DraftKings, FanDuel, bet365 hold top spots

While DraftKings, FanDuel, and bet365 are the most used sportsbook apps/sites overall, younger sports bettors are more likely to use emerging sportsbooks like ESPN BET more frequently.

*Sports betting app/site used most frequently*  
(January 5-18, 2024, N=1602)

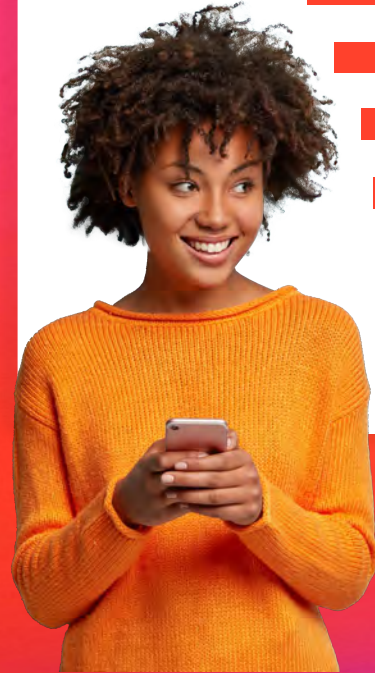
Sports betting app/sites used most by US sports bettors



[Explore more data >](#)

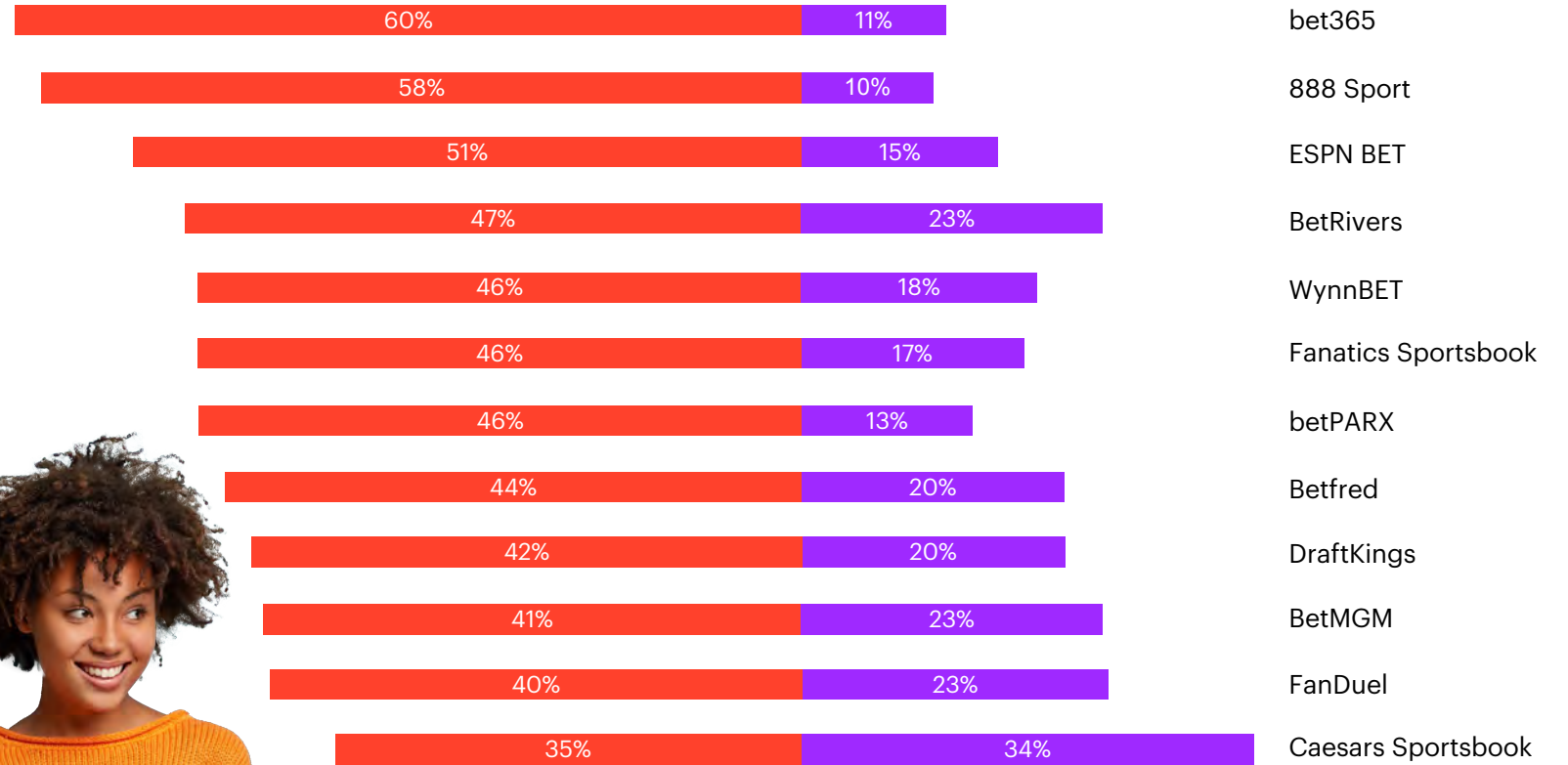
[Get in touch >](#)

# Overall sportsbook usage trending up; emerging brands showing more momentum



## Sportsbook usage trends among sports bettors

■ I am using this more ■ I am using this less

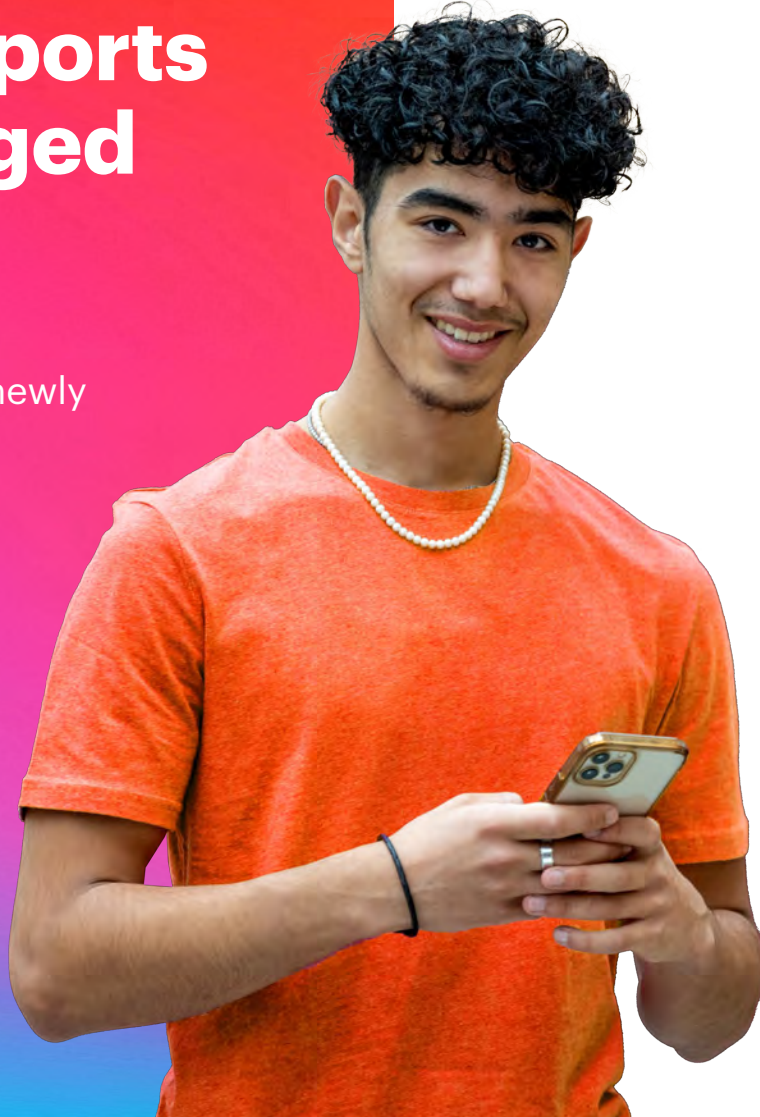


Thinking about when you first started to participate in online sports betting, how has your usage of each app changed over time? (January 5-18, 2024, N=1,602)



# Top sportsbooks with US sports bettors aged 21-24

bet365 overtakes DraftKings as #1 with newly legal American sports bettors.



Rank	Sportsbook	US bettors aged 21-24 using
1	bet365	31%
2	DraftKings	25%
3	FanDuel	22%
4	ESPN BET	18%
5	888 Sport	12%
6	BetMGM	11%
7	Caesars Sportsbook	6%
8	WynnBET	6%
9	BetRivers	3%
10	Fanatics Sportsbook	3%

Which of the below sports betting apps/sites have you used in the past month? Please select all that apply. (January 5-18, 2024, N=122)

# Top sportsbooks with US sports bettors aged 25-34

**bet365's dominance with young Americans persists,** overall usage up from 21-24 year-olds.

Rank	Sportsbook	US bettors aged 25-34 using
1	bet365	40%
2	DraftKings	31%
3	FanDuel	29%
4	BetMGM	24%
5	ESPN BET	21%
6	888 Sport	14%
7	Caesars Sportsbook	10%
8	WynnBET	8%
9	BetRivers	8%
10	Fanatics Sportsbook	5%

[Explore more data >](#)

[Get in touch >](#)

Which of the below sports betting apps/sites have you used in the past month? Please select all that apply.  
(January 5-18, 2024, N=476)



# Top sportsbooks with US sports bettors aged 35-44

The biggest sports betting group, 35-44s sportsbook rankings mirror gen pop.



Rank	Sportsbook	US bettors aged 35-44 using
1	DraftKings	37%
2	FanDuel	36%
3	bet365	30%
4	BetMGM	27%
5	ESPN BET	21%
6	888 Sport	12%
7	Caesars Sportsbook	10%
8	WynnBET	7%
9	BetRivers	7%
10	Fanatics Sportsbook	6%

Which of the below sports betting apps/sites have you used in the past month? Please select all that apply. (January 5-18, 2024, N=538)



# Top sportsbooks with US sports bettors aged 45-54

**DraftKings and FanDuel dominate with 45-54s,** ESPN BET not far behind third place.

Rank	Sportsbook	US bettors aged 45-54 using
1	DraftKings	34%
2	FanDuel	33%
3	BetMGM	16%
4	bet365	12%
5	ESPN BET	12%
6	Caesars Sportsbook	8%
7	888 Sport	5%
8	BetRivers	5%
9	Fanatics Sportsbook	4%
10	Betfred	3%



[Explore more data >](#)

[Get in touch >](#)

Which of the below sports betting apps/sites have you used in the past month?  
Please select all that apply. (January 5-18, 2024, N=476)



# Top sportsbooks with US sports bettors that are 55+

**DraftKings used recently by nearly half (46%) of 55+ sports bettors.**

Rank	Sportsbook	US bettors aged 55+ using
1	DraftKings	46%
2	FanDuel	34%
3	BetMGM	17%
4	ESPN BET	8%
5	Caesars Sportsbook	8%
6	bet365	6%
7	BetRivers	4%
8	Other	4%
9	Fanatics Sportsbook	3%
10	WynnBET	1%

*Which of the below sports betting apps/sites have you used in the past month? Please select all that apply. (January 5-18, 2024, N=251)*



# Top sportsbooks with US sports bettors

**DraftKings leads overall, ESPN BET in top 5 despite recent market entrance.**

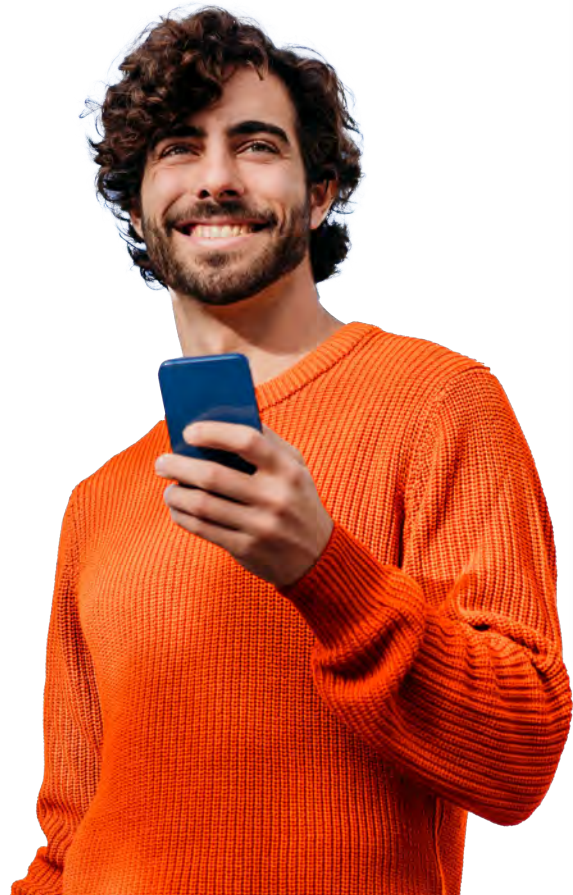


Rank	Sportsbook	US bettors using	21-24 rank	25-34 rank	35-44 rank	45-54 rank	55+ rank
1	DraftKings	35%	2	2	1	1	1
2	FanDuel	32%	3	3	2	2	2
3	bet365	28%	1	1	3	4	6
4	BetMGM	22%	6	4	4	3	3
5	ESPN BET	18%	4	5	5	5	4
6	888 Sport	10%	5	6	6	7	11
7	Caesars Sportsbook	9%	7	7	7	6	5
8	BetRivers	6%	9	9	9	8	7
9	WynnBET	6%	8	8	8	11	10
10	Fanatics Sportsbook	5%	10	10	10	9	9

Which of the below sports betting apps/sites have you used in the past month?  
Please select all that apply. (January 5-18, 2024, N=1602)

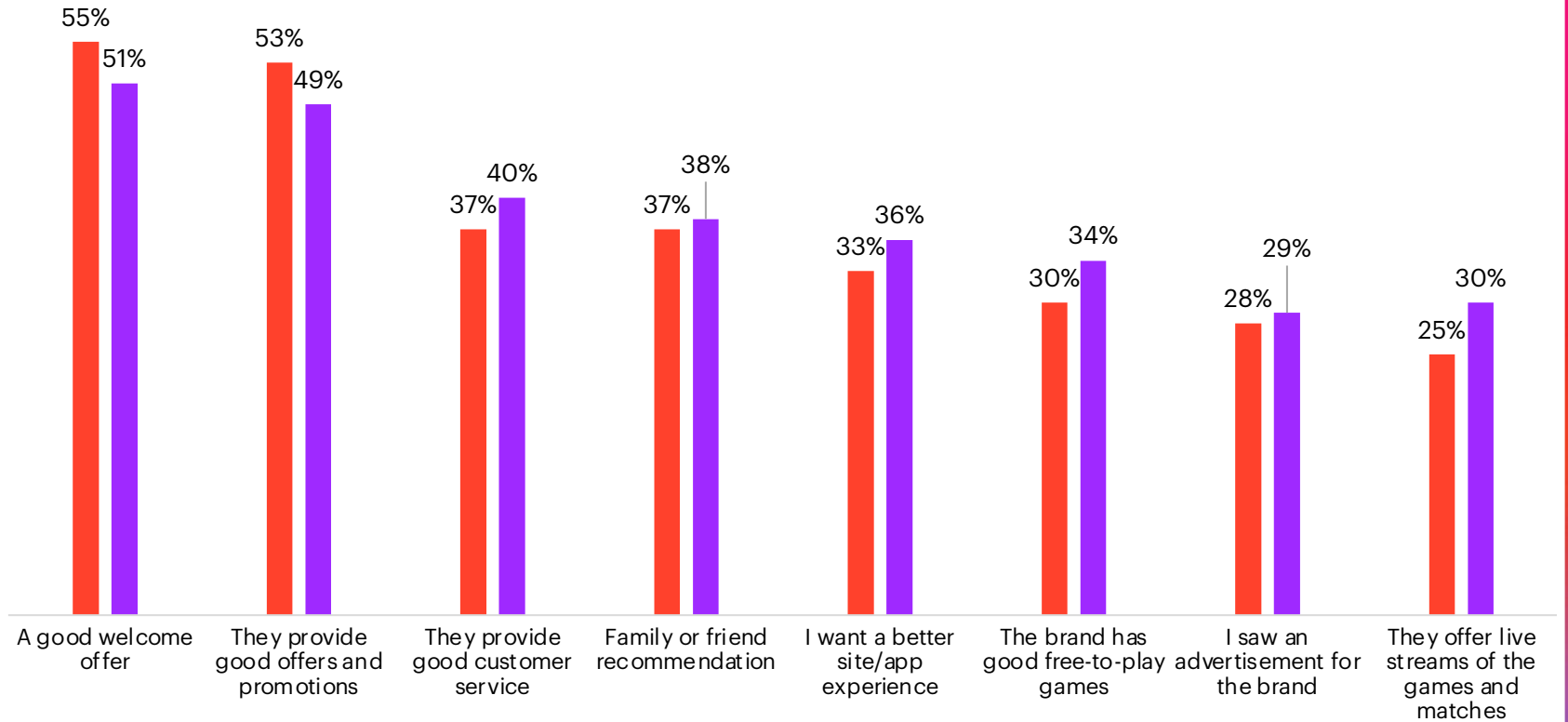


# Why do sports bettors create new accounts?



### Top reasons that current sportsbook users create new accounts

■ All ages ■ 25-44 year olds



[Explore more data >](#)

[Get in touch >](#)

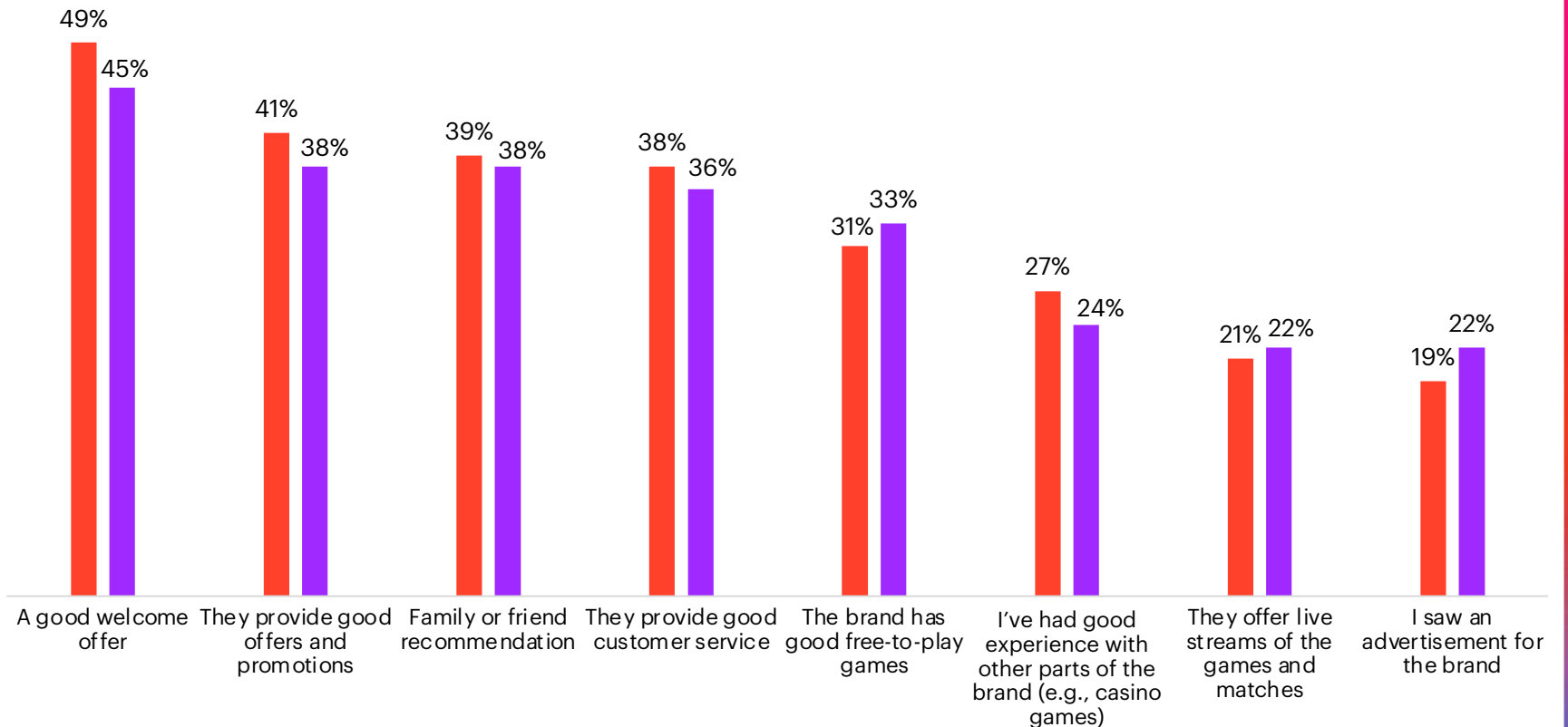
Main reasons to create an account (January 5-18, 2024, N=2262)

# Why would prospective bettors start betting?



Top reasons that non-users may create an account

■ All Ages ■ 25-44



Main reasons to create an account (January 5-18, 2024, sportsbook user N=1602 - non-user, non-rejector N=660)



# Less is not more when it comes to in-app features

## Key attributes:

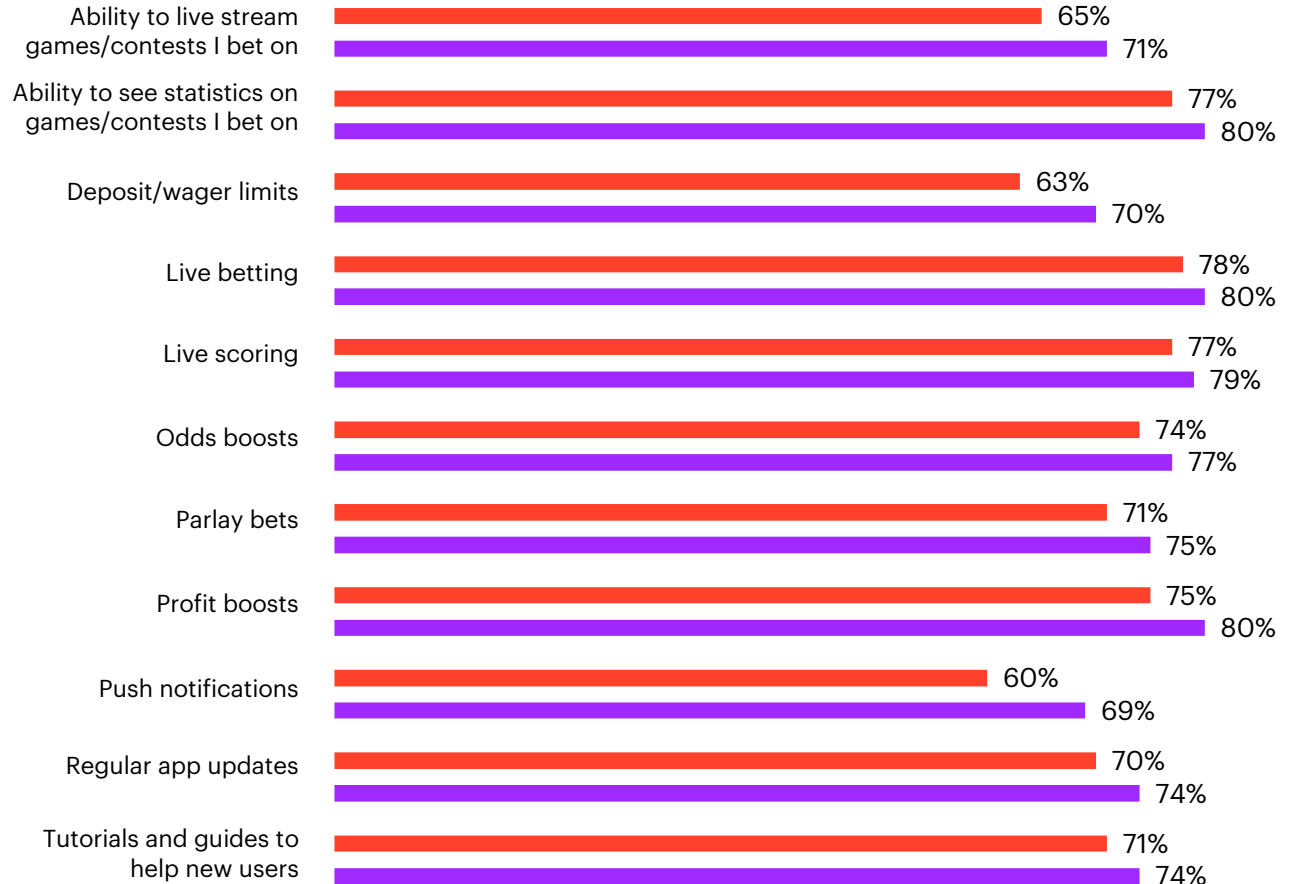
- 74% placed importance on: 'is easy to place a bet while I'm watching sports'
- 69% of 35–44 year-olds placed importance on: 'streams live sports in the app'

[Explore more data >](#)

[Get in touch >](#)

## Importance of specific in-app sportsbook features

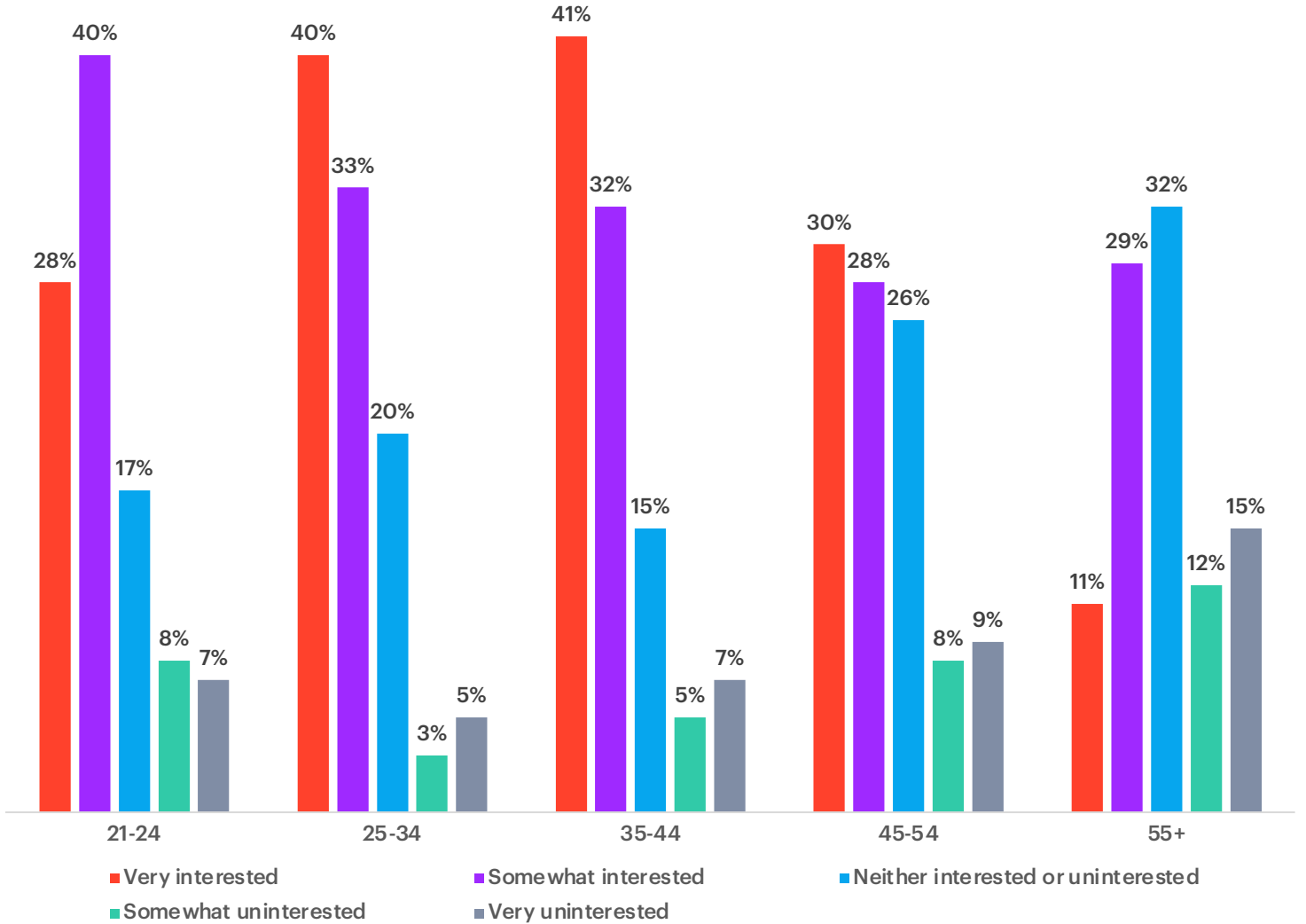
■ All ages ■ 25-44



# The need to stream: A future heartbeat of in-app engagement



### Live streaming sporting events in sportsbook apps



How interested are you in using a sports betting site/app to live stream a game or contest in the same app that you placed a bet on? (January 5-18, 2024, N=2168)

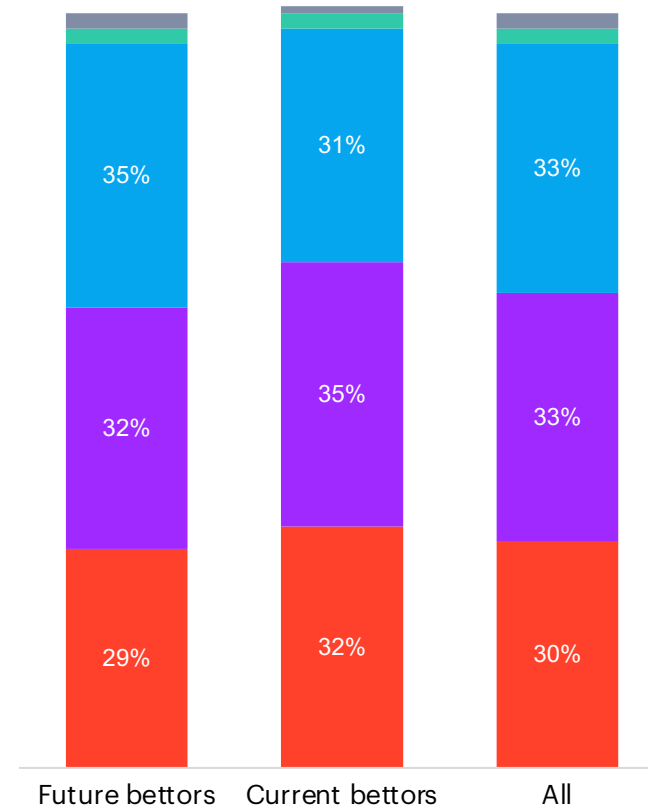


# Live streaming, the difference-maker your app needs

If only one sportsbook had the ability to live stream the game or contest you plan to bet on, would you be more or less likely to use the site/app with the live streaming ability?

## Live streaming feature would motivate usage of that app

- Much more likely
- Somewhat more likely
- No impact
- Somewhat less likely
- Much less likely




Likelihood to use site/app with live streaming  
(January 5-18, 2024, N=2262)

Explore more data >

Get in touch >





# Do live streamers bet more?

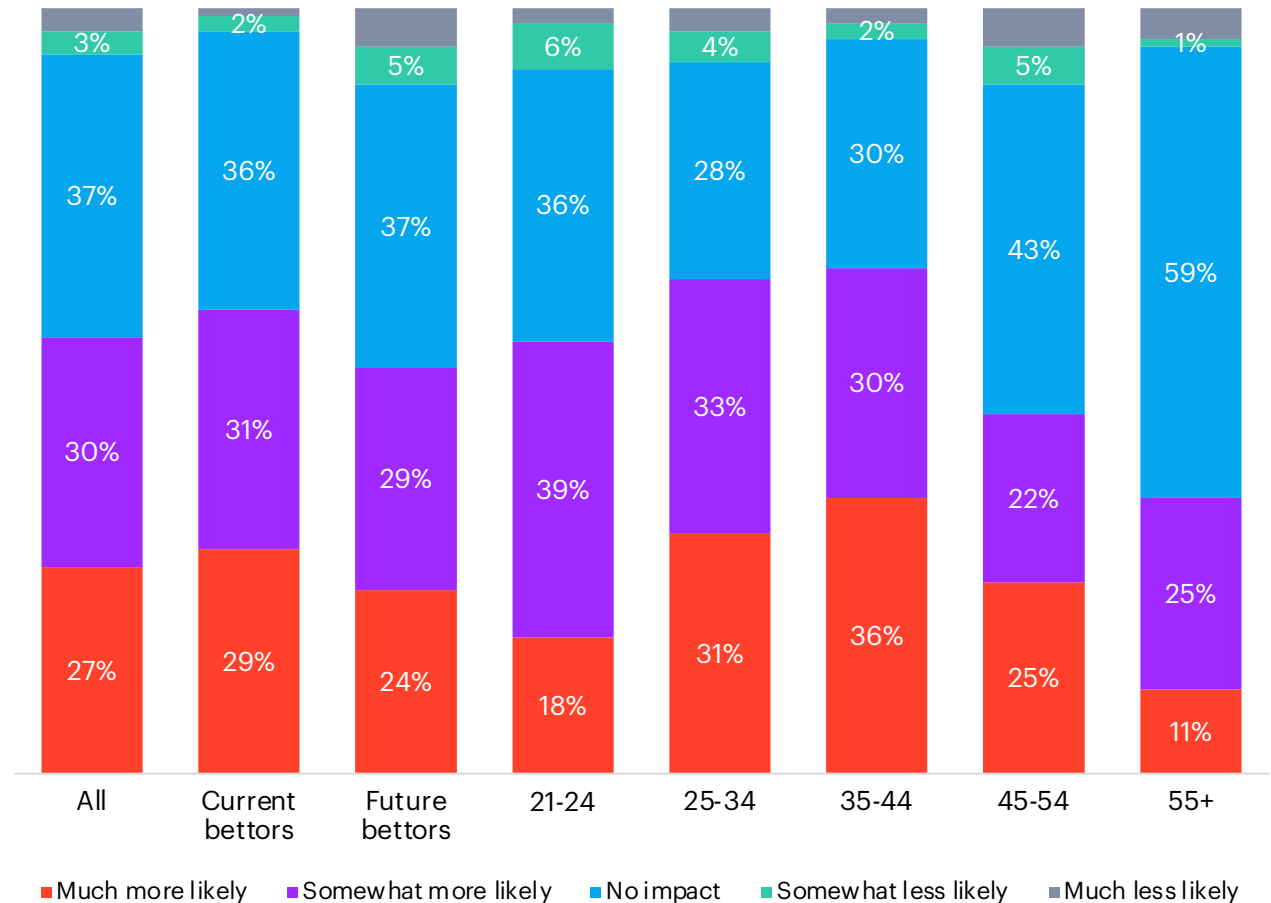


# Stream rising to the top?

60% of current sports bettors say they would be more likely to use a book associated with a streaming service.

**How does a streaming service that is associated with a sports betting site/app impact your use of that brand's product?**

Impact of streaming service on use of sports betting apps/sites



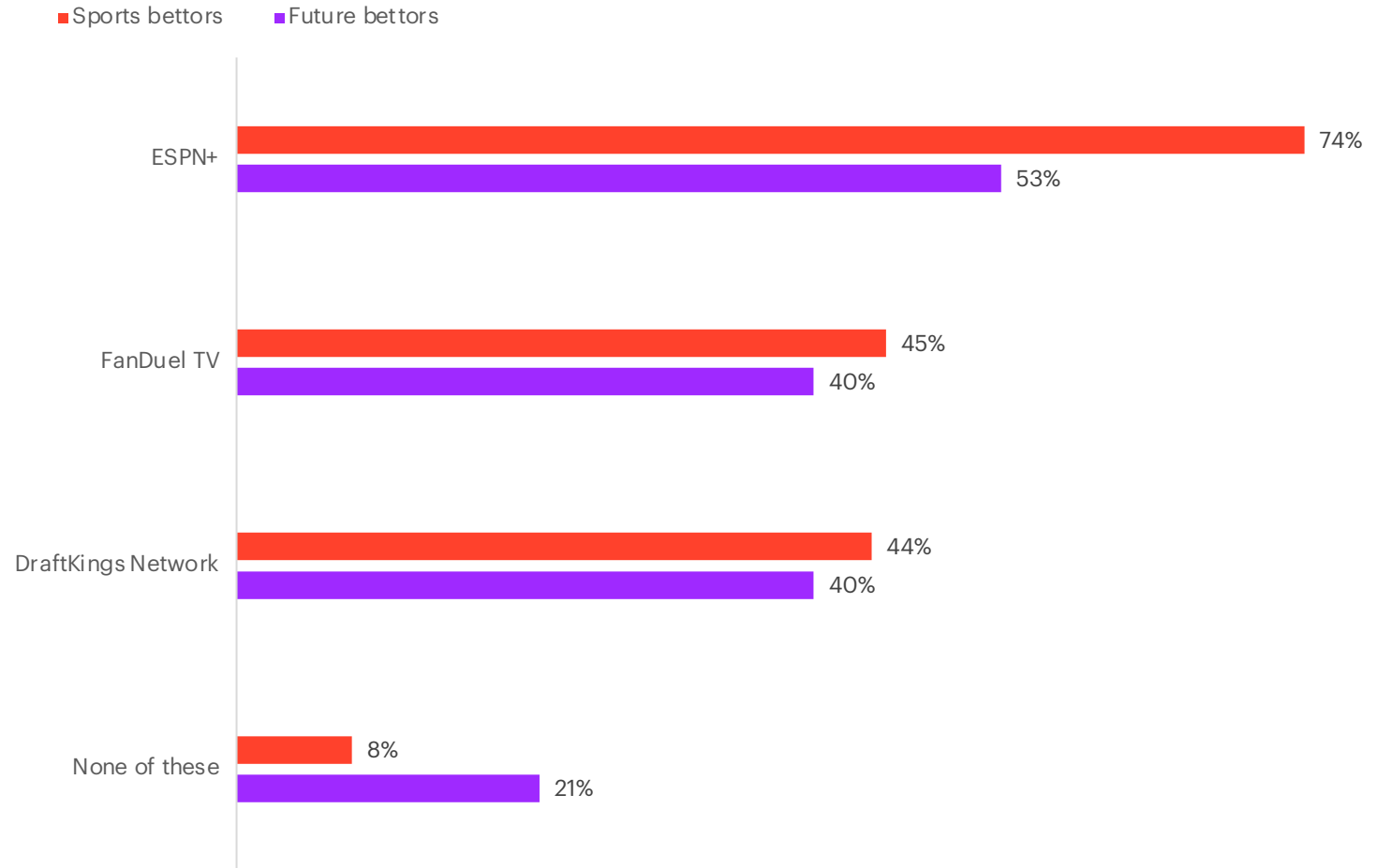
Impact of streaming service on use of sports betting site/app (January 5-18, 2024, N=2262)

# Sports betting streaming penetration

Considering that bettors say they are more likely to use a betting app associated with a streaming service, ESPN BET's awareness among bettors positions the book for sustained growth.



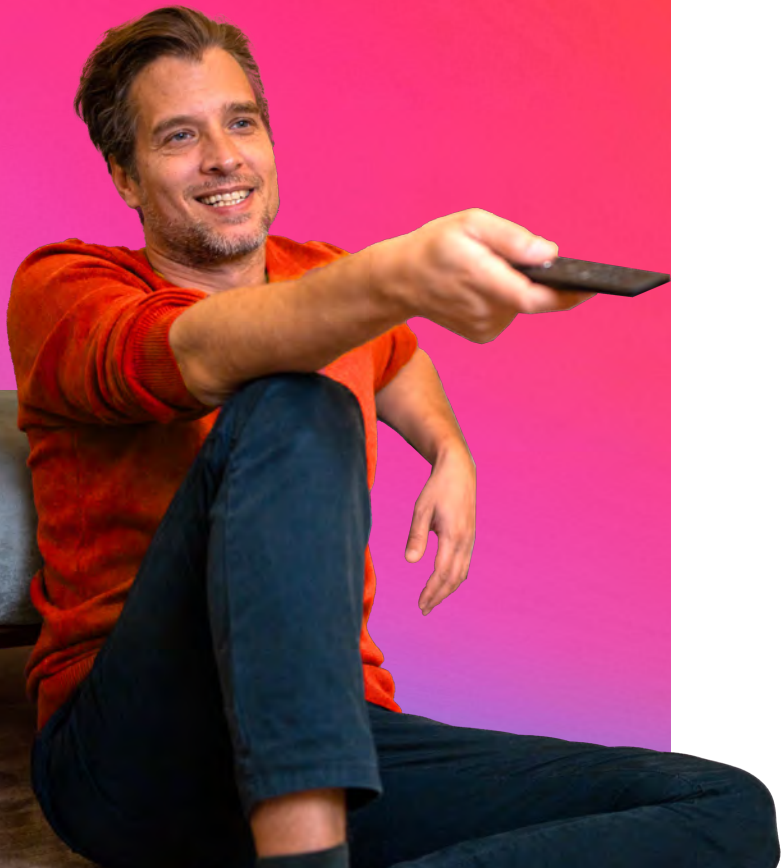
## Awareness of sports betting streaming services



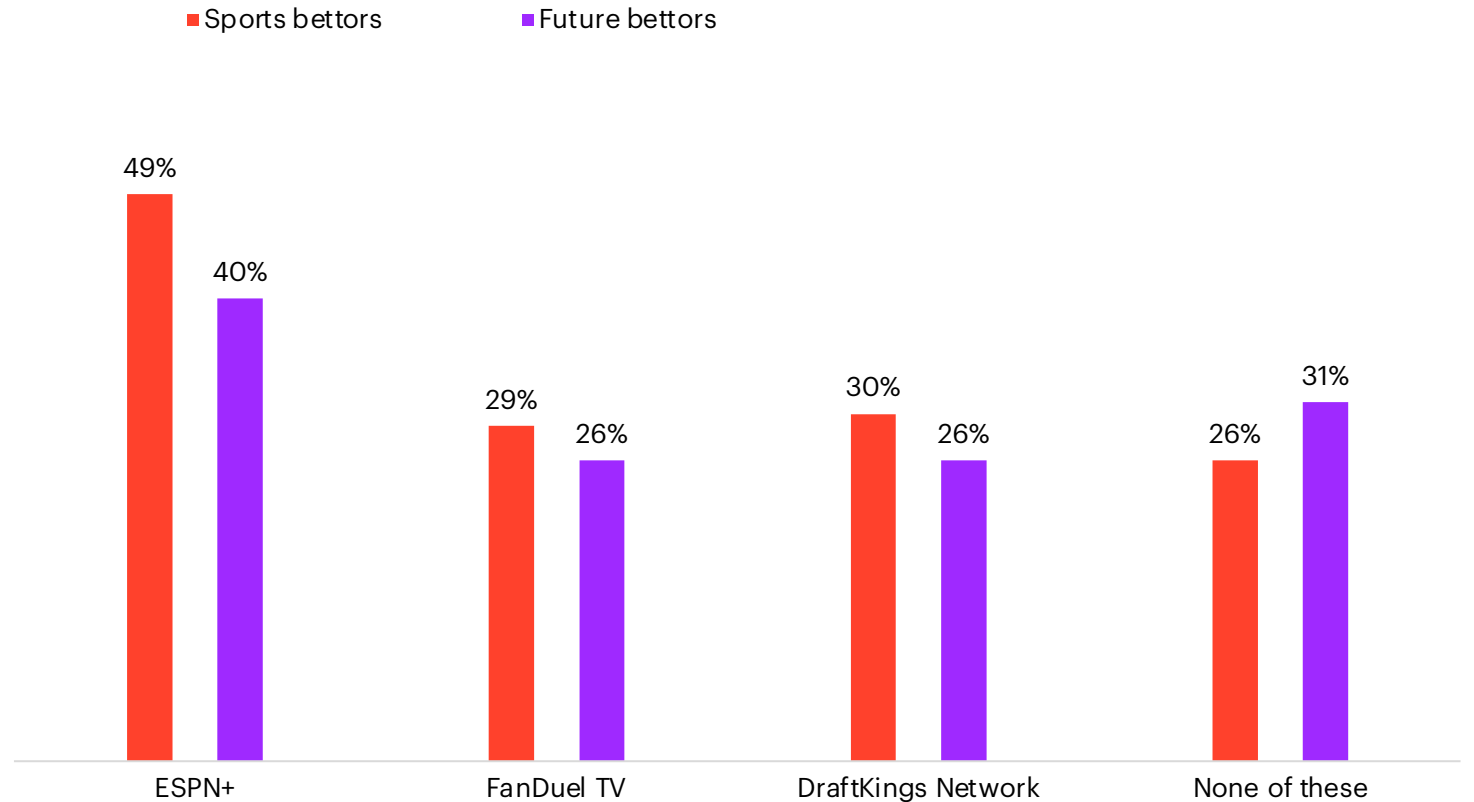
As you may know, some sports betting sites/apps are associated with streaming services. Which of the below streaming services have you ever heard of? Please select all that apply. (January 5-18, 2024, N=2262)



# Sports betting streaming conversion



## Usage of sports betting streaming services (Among Americans who have heard of 1+)



Which of the below streaming services associated with a sports betting site/app have you ever used?  
Please select all that apply. (January 5-18, 2024, N=2262)

# Sports betting drives content consumption

## Top reasons for watching a sports betting streaming service

[Explore more data >](#)[Get in touch >](#)

Why do you watch content on streaming services associated with a sports betting site/app?  
Please select all that apply. (January 5-18, 2024, N=2262)



# Explore better research solutions for your business

Get a demo

## 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 additional casino, sportsbook and other related brands not covered within this report.

## 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 analyzed 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

---

Living consumer intelligence | [yougov.com/business](https://yougov.com/business)

YouGov, 2024, all rights reserved. All materials contained herein are protected by copyright laws. Any storage, reproduction or distribution of such materials, in whole or in part, in any form without the prior written permission of YouGov is prohibited. This information (including any enclosures and attachments) is proprietary and confidential and has been prepared for the exclusive use and benefit of the addressee(s) and solely for the purpose for which it is provided. We make no representations, warranties or guarantees, whether express or implied, that the information is accurate, complete or up to date. We exclude all implied conditions, warranties, representations or other terms that may apply and we will not be liable to you for any loss or damage, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, even if foreseeable, arising under or in connection with use of or reliance on the information. We do not exclude or limit in any way our liability to you where it would be unlawful to do so.